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ABSTRACT

The following papers are included: "Editorial" (Heribert Hinzen); "Skills and Literacy Training for Better Livelihoods: A Review of Approaches and Experiences" (John Oxenham, Abdoul Hamid Diallo, Anne Ruhweza Katahoire, Anna Petkova-Mwangi, Oumar Sall); "'Learning to Read Woke Me Up!': Motivations, and Constraints, in Learning to Read in Pulaar (Senegal)" (Sonja Fagerberg-Diallo); "Literacies and Livelihoods: the DFID (Department for International Development) Kathmandu Conference" (Julia Betts); "A Case for Renewed Engagement with Adult Basic Education in Africa" (Jon Lauglo); "Questions for Adult Educators" (Usa Duongasaa); "Uganda's Exemplary Fight against AIDS" (Sabine Ludwig); "Inaugural Address of the 11th German Adult Education Conference" (Johannes Rau); "Lifelong Learning in Europe" (Viviane Reding); "Globalization: Is the South Losing Touch?" (Franz Nuscheler); "Reflections on International Cooperation and New Partnerships in the 'Age of Globalization'" (Marcie Boucouvalas, John A. Henschke); "A Forum for Information and Exchange. Impressions from 'The Future Needs Learning Needs a Future' Conference" (Heribert Hinzen); "Development Policy in the 21st Century: Potential and Options for Action" (Michael Bohnet); "From Leisure Education to Lifelong Learning: 50 Years of the UNESCO (United Nations Educational, Scientific and Cultural Organization) Institute for Education" (Joachim H. Knoll); "Communique from the First Meeting, UNESCO, Paris, 29-30 October 2001)" (High-Level Group on Education for All); " Participants' Bill of Rights: Declaration of Rights of Adults in Education"; "Participation in the ICAE (International Council for Adult Education) World

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Assembly: Thematic Workshop on Documentation and on Training of Adult Educators" (Anthony Okech); "Adult Learning: A Key to Democratic Citizenship and Global Action" (International Council for Adult Education); "Third International Meeting of the Network of Pedagogical Universities of the South Caucasus Region (Yerevan, Armenia, 14-16 November, 2001)" (UNESCO); "Global Learn Day, a 24-Hour Celebration of Distance Education and Technology" (Terrence R. Redding); "Adult Learners' Week: The Australian Experience" (Roger K. Morris); "A System of Lifelong Learning--Aims and Direction of Reforms in Georgia" (Wachtang Sartania); "Education for Nation Building: The Contribution of Non-Formal Education in Fiji" (Akanisi Kedrayate); and "Popular Education and Improved Material and Cultural Prospects for Kondh Adivasis in India" (Dip Kapoor, Kumar Prasant). Some papers contain substantial bibliographies. (MN)

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ADULT EDUCATION AND DEVELOPMENT

IIZ DVV

INSTITUTE FOR INTERNATIONAL COOPERATION OF THE GERMAN ADULT EDUCATION ASSOCIATION

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Literacy and Livelihoods

11th German Adult Education Conference

Celebrations – Declarations – Conferences

Adult Education: Project and Country Reports

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2002

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ADULT EDUCATION AND DEVELOPMENT

is a half-yearly journal for adult education in Africa, Asia and Latin America. At first, in 1973, the journal was intended by the German Adult Education Association (DVV) to help keep in touch with past participants in DVV further training seminars and to support the work of projects abroad. Today, the journal is a forum for dialogue and the exchange of information between adult educators and authors in Africa, Asia and Latin America, both among themselves and with colleagues in the industrialized nations. It is intended to disseminate and discuss new experiences and developments in the theory and practice of adult education. The main target group consists of adult educators working at so-called middle levels in teaching, organization or administration. Increasingly, staff in related fields such as a health education, agriculture, vocational training, cooperative organizations etc. have been included, as their tasks are clearly adult education tasks. We also aim to adult educators at higher and top levels, academics, library staff and research institutions both in Africa, Asia and Latin America and in the industrialized nations.

We herewith invite adult educators from all parts of the world to contribute to this journal. Articles should bear a considerable reference to practice. All fields of adult education and development can be treated, i. e. adult education should be regarded in its widest sense. We kindly ask you to send us articles of about 1500 words; footnotes should be used as sparingly as possible.

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58
2002

ADULT EDUCATION AND DEVELOPMENT

CONTENTS

Editorial 3

LITERACY AND LIVELIHOODS

John Oxenham/ Abdoul Hamid Diallo/ Anne Ruhweza Katahoire/ Anna Petkova-Mwangi/ Oumar Sall
Skills and Literacy Training for Better Livelihoods A Review of Approaches and Experiences 8

Sonja Fagerberg-Diallo
"Learning to Read Woke Me Up!": Motivations, and Constraints, in Learning to Read in Pulaar (Senegal) 45

Julia Betts
Literacies and Livelihoods: the DFID Kathmandu Conference 61

Jon Lauglo
A Case for Renewed Engagement with Adult Basic Education in Africa 67

Usa Duongsaa
Questions for Adult Educators 83

Sabine Ludwig
Uganda's Exemplary Fight against AIDS 89

11th GERMAN ADULT EDUCATION CONFERENCE

Johannes Rau
Inaugural Address of the 11th German Adult Education Conference 96

Viviane Reding
Lifelong Learning in Europe 103

Franz Nuscheler
Globalization: Is the South Losing Touch? 117

Marcie Boucouvalas/ John A. Henschke
Reflections on International Cooperation and New Partnerships in the "Age of Globalization" 133

Heribert Hinzen
A Forum for Information and Exchange. Impressions from "The Future Needs Learning Needs a Future" Conference 143

ADULT EDUCATION AND DEVELOPMENT

CELEBRATIONS – DECLARATIONS – CONFERENCES

Michael Bohnet
Development Policy in the 21st Century: Potential and Options for Action 153

Joachim H. Knoll
From Leisure Education to Lifelong Learning: 50 Years of the UNESCO Institute for Education 159

High-Level Group on Education for All
Communiqué from the first Meeting, UNESCO, Paris, 29–30 October 2001 167

Declaration of Rights of Adults in Education
Participants' Bill of Rights 173

Anthony Okech
Participation in the ICAE World Assembly: Thematic Workshop on Documentation and on Training of Adult Educators 177

ICAE – The Ocho Rios Declaration
Adult Learning: A Key to Democratic Citizenship and Global Action 183

UNESCO
Third International Meeting of the Network of Pedagogical Universities of the South Caucasus Region 187

ADULT EDUCATION: PROJECT AND COUNTRY REPORTS

Terrence R. Redding
Global Learn Day, a 24-Hour Celebration of Distance Education and Technology 193

Roger K. Morris
Adult Learners' Week: The Australian Experience 201

Wachtang Sartania
A System of Lifelong Learning – Aims and Direction of Reforms in Georgia 209

Akanisi Kedrayate
Education for Nation Building: The Contribution of Non-Formal Education in Fiji 215

Dip Kapoor/ Kumar Prasant
Popular Education and Improved Material and Cultural Prospects for Kondh Adivasis in India 223

Editorial

There is a new debate about the meaning of literacy. This is needed both because the number of those whose reading, writing and mathematical skills are inadequate is rising in developing countries, and because it is only now that the issue is being treated honestly in certain countries, such as those in transition. The debate is between theoreticians and practitioners – over the nature of the various "literacies", for example – between policy-makers and government – over priorities, for example – and between providers and funding bodies – since money is always too tight. State, civil society and university agencies at the local, national and international level are involved, or are involving themselves. The debate is driven indirectly by very necessary attempts to influence globalization and by poverty reduction schemes, which see participation and capacity building as part of the process of economic growth and the establishment of basic social services. Other crucial efforts, more closely tied to the narrow field of education, are intended to respond to the objectives and challenges clearly set out in 2000 at the Dakar World Education Forum on Education for All: *"achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults"*.

Sound arguments are called for in this clarification process. The various sectors are fighting over the many additional billions of dollars or euros that are needed. Convincing arguments have therefore to be put forward to show that investment is worthwhile. Research has a part to play: the study prepared on behalf of the World Bank, extracts from which are reprinted here, provides a good example because it adds a variety of literacy and development concepts to the debate – REFLECT, livelihoods and campaigns. It nonetheless strengthens the argument for *"re-engaging with adults"* in relation to the justification of investment. The literacy debate will continue in many forms, especially at international conferences. The IIZ/DVV Project Office in Cape Town has just supported such a conference for our South African part-

6

ners, which will be documented in a variety of ways; this journal, for example, will report on it.

The last issue contained several articles looking back over earlier German Adult Education Conferences. Readers may recall that colleagues from local centres have the opportunity every five years to exchange experiences and information about their situation with representatives of their regional and national associations and committees and, more importantly, with educational policy-makers and people from other adult education organizations. While the slogan in Leipzig in 1996 was *"Continue thinking – Continue education"*, the general direction for 2001 in Hamburg was summed up as *"The Future Needs Learning Needs a Future"*. The President of the Federal Republic of the day has never failed to attend and to address participants. And for the first time, an EU Commissioner for Education described the ideal of lifelong learning as a key factor in the development of the European Union. International attendance, and sessions concerned with European and international issues were among the highlights of this year's Conference. The final meeting of the DVV Board of Management agreed that the IIZ/DVV could be proud to have been responsible for this development. In this whole series of meetings of up to a thousand colleagues, which have set out to present and discuss achievements and prospects, there have in fact never been so many participants from absolutely all European countries, and indeed across the world.

This journal has appeared since 1973. It has been supported financially from the outset, and still is funded, by the Federal Ministry of Economic Cooperation and Development (BMZ). This Ministry celebrated its 40th anniversary in 2001. It has come a long way – from development aid in the era of decolonization to a holistic approach to global structural policies for peace. From what we can tell from the feedback we receive, our readers are as grateful as are we, the publishers, for this support for our publishing programme, since it allows us to communicate with our partners and to share more general information than is possible within specific projects.

Heribert Hinzen

LITERACY AND LIVELIHOODS

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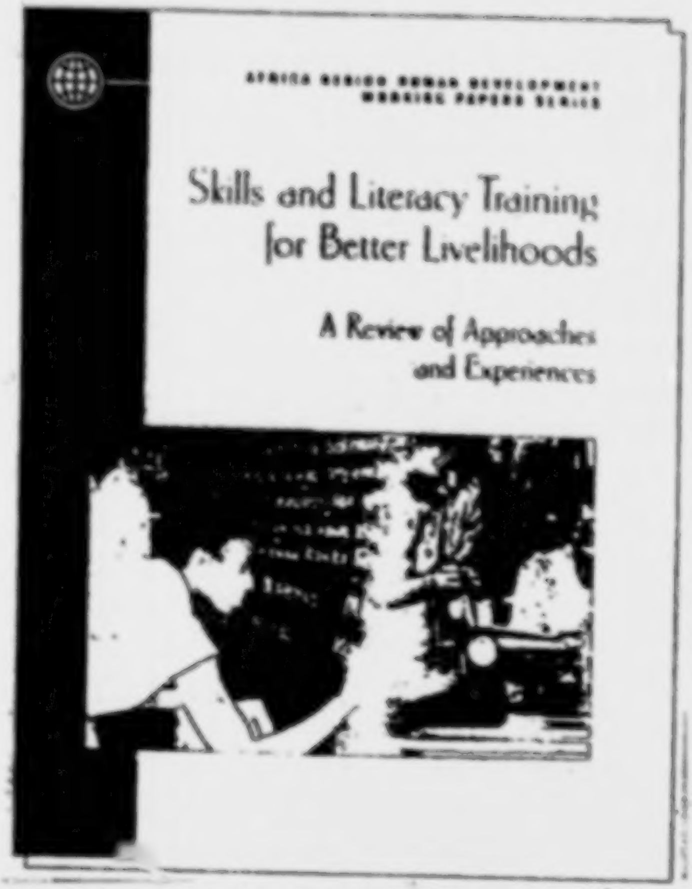

AFRICA REGION HUMAN DEVELOPMENT
WORKING PAPERS SERIES

Skills and Literacy Training
for Better Livelihoods

A Review of Approaches
and Experiences

Too often, policy for vocational education in developing countries has only concerned itself with a literate minority within the labor force. This study helps to widen that view. From the perspective of "Education for All" and "Livelong Education", the report examines efforts to combine vocational training with literacy education to enable a very poor, illiterate labor force, especially rural women, to develop more productive livelihoods and take on increasingly active roles in transforming their families and communities. The aim is to assess whether and how official policy should support such efforts. Based on documentary evidence from several countries, particularly Guinea, Kenya, Senegal and Uganda, the report suggests that vocational education policy should encompass out-of-school and illiterate youth and adults, but to be effective would require gradualism, decentralisation, capacity nurturing, flexibility and components of savings, credit and enterprise development.

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The IIZ/DVV was invited by the World Bank to undertake a document study on two (2) strategies to promote literacy and training for livelihood skills:

- *Literacy instruction incorporating livelihood skills,*
- *Livelihood skills training incorporating literacy instruction.*

In other words, one of these strategies is to use literacy programmes to help learners to make their livelihood skills more productive.

The other strategy is to make use of vocational training programmes – agricultural extension, micro enterprises – by incorporating relevant aspects of reading, writing and mathematics.

The research team, headed by Dr John Oxenham, consultant in chief, examined four (4) African countries in detail, Uganda, Kenya, Senegal and Guinea, and sifted the documentation held by a number of bilateral and multilateral organizations.

Our aim was to assess whether this type of incorporation can:

- *increase the effectiveness of programmes by improving students' loyalty and achievements, and*
- *encourage use of the skills acquired both to raise the productivity of their livelihood skills and to open up access to wider information so as to improve their well-being.*

This invitation grew out of the World Bank evaluation of technical and vocational education policy in Africa. The Bank wished to look at the issue from the perspective of Education for All and lifelong learning, rather than solely that of schools, colleges, technical institutes and universities.

The complete report is being published in the Human Development Working Papers Series by the Africa Region of the World Bank. It can be requested at afrhdseries@worldbank.org. It will also be available electronically from the World Bank. In the Bank's programme of work the study is one of a series of studies in the Africa Region on how best to support countries that wish to invest in vocational skills development. It also supplements earlier studies published recently on Adult Basic Education. More information on these studies is found at the Bank's Adult Outreach Education website http://www1.worldbank.org/education/adultoutreach/publication.htm. The financial contribution of the Norwegian Education Trust Fund for Africa to these studies is much appreciated. Because of the size of the bibliography and the large number of references, we have only listed those relevant to the passages which we have published.

John Oxenham / Abdoul Hamid Diallo /
Anne Ruhweza Katahoire / Anna Petkova-Mwangi /
Oumar Sall

Skills and Literacy Training for Better Livelihoods

A Review of Approaches and Experiences

Foreword

In April 2000, the delegates at the World Education Forum in Senegal collectively drew up the Dakar Framework for Action, in which they committed themselves to do everything possible to

- achieve a 50 percent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults
- improve and ensure excellence in all aspects of the quality of education, so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

The World Bank was one of the key players in the preparation and implementation of the Forum, along with UNESCO, UNICEF and the ILO, among other concerned UN organizations. Our Institute was involved in the preparatory process in Germany and participated in Dakar as one of the non-governmental organizations (NGOs) working in education and development. For us, this marked another milestone in our almost four decades of continuous support for adult literacy with partners in Africa, Asia and Latin America.

When the Human Development Sector of the Africa Region of the World Bank asked whether we would be interested in managing a study of literacy and livelihoods, we could not but immediately agree on both the importance of the research and our readiness to support it. We considered it a great opportunity to inject fresh information and ideas into the discussion of approaches to improving literacy interventions in practice and theory, whether from our own many projects and publications or from the programs and documents of others. Over the years, our partners have again and again debated with us questions such as *"Does literacy come first and development follow?"* or *"How much literacy is needed as a prerequisite to development?"* or *"How can both be integrated?"* The issue of the relationship between literacy, skills training and livelihoods widens this quest for improved developmental outcomes. We think that the title *"Strengthening Livelihoods with Literacy"* adequately reflects the findings of the study. It is at the same time a programmatic title for future literacy endeavors by governments, NGOs, co-operating agencies, and the participants themselves.

It is our feeling that the study team has done an excellent job. At the beginning of the study, a workshop including the four authors of the country cases, the lead researcher and members of our staff, created a clear common understanding of the questions and a plan of work. At another workshop at the end, the five draft reports were reviewed and a set of common conclusions was formulated. What you have in front of you is the team's product.

We would like to thank the study team and all those who supported their work. There were indeed many! We see the study as an important contribution to fulfilling our commitment to literacy learners and their providers, and to high quality education for all.

Prof.(H) Dr. Heribert Hinzen
Director, IIZ/DVV

Henner Hildebrand
Task Manager, IIZ/DVV

Acknowledgements

The first acknowledgements must go to the Africa Region of the World Bank and to the Government of Norway. By initiating and financing this study, they are helping to enrich a field that has not generated the attention and high quality evaluation and research that the rhetoric of poverty reduction, education for all, and lifelong education might have led the world to expect. The next salute goes to Dr. Josef Mueller, formerly of the German Foundation for International Development, now an independent consultant, for his Trojan work in collecting and annotating materials from a number of organizations in Germany and elsewhere.

The study itself depended to a large extent on documents that are not in the public domain. Most of them had to be identified, located, and retrieved from the files and archives of many organizations in many countries. That meant that many people had to make the time and take the trouble to suggest what work might repay attention, what documentation might be available, and where it might be found. Many also assisted in obtaining the documents, although laying hands on them was not always easy or always successful. The study team is heavily indebted to them all in the four countries of intensive study, Guinea, Kenya, Senegal, and Uganda, and in the headquarters of many bilateral, multilateral, and non-governmental agencies in Europe and North America. The full list of them is lengthy. Here, only the names of their organizations will appear.

The study is indebted also to 13 friends who, despite heavy work programs of their own, troubled to comment rapidly and extensively on the first draft of this paper: *Terry Allsop, Julia Betts, Dipta Bhog, Harbans Bhola, Michael Brophy, John Comings, Pat Davis, Heribert Hinzen, Richard Johanson, Jon Lauglo, Josef Mueller, Helen Sherpa and Chij Shrestha*. We hope that they judge their advice has been satisfactorily taken in this revised text.

The study team expresses its deep gratitude to all its helpers and supporters and hopes that this product will help them feel that their time

and effort were well spent. All responsibility for any misreporting, misunderstanding or misinterpretation that appears in the report lies with the team...

1 Executive Summary

From the perspective of vocational education within the purview of lifelong education for all, this report aims to use available documentary accounts to compare and assess the effectiveness of two types of education and training programs for poor adults: (a) programs that have attempted to incorporate training for livelihood skills into mainly literacy instruction, and (b) programs that have incorporated literacy instruction into training for mainly livelihood skills. The comparison should help answer four questions about such efforts:

1. What approaches have been used?
2. What are the documented outcomes and impacts of these approaches?
3. What are the lessons regarding management, implementation, and resource requirements?
4. What approaches are likely to be most effective under conditions prevailing in Sub-Saharan Africa, and what are the pitfalls to avoid?

Sources of Information

Because there is little published literature on the four questions, this report has had to rely largely on documentation internal to many organizations located in four countries of Africa, as well as in Western Europe and North America. However, in Guinea, Kenya, Senegal, and Uganda, brief field observations and interviews with interested parties have supplemented the documentation.

Much of the helpful documentation came from organizations that are in principle more concerned with employment and livelihoods than with education, but that find training in literacy and numeracy to be essential for their own purposes. Examples are FAO, IFAD, ILO and nongovernmental organizations (NGOs) that strive for holistic development. Unfortunately, we must emphasize that the nature of the available evidence makes the conclusions and recommendations of the study *only tentative. They are more in th*e nature of reasonable hypotheses than incontrovertible facts.

Also, it is the case that the documentation did not yield satisfactory responses to Question 3 on management, implementation, and resource requirements. Neither did it further any discussion of the crucial issues of organizational and institutional development. The report shows that, without the construction of effective organizations and sound institutional norms, very poor people will not be enabled to use literacy to make their livelihoods more productive.

Approach to Study

The study's basic task was to examine two broad approaches to combining livelihood training with literacy instruction. One approach is to enrich a livelihood-led program with components in calculating, writing, and reading. The other is to enrich a literacy-led program with training for one or more livelihoods. Within these two approaches, a framework developed by Rogers (1997) that distinguishes five sub-categories, proved useful to the study. They are:

1. Literacy as a prerequisite or in preparation for training in livelihood or income-generation activities. That is, training in a livelihood is the longer term aim, but people are encouraged not to start training in a livelihood, until they have first mastered reading, writing, and calculating sufficiently to cope with the livelihood's operating and development requirements. There is a planned progression between the two.
2. Literacy followed by separate livelihood or income-generation activities. Here, learning literacy is regarded as a self-standing and worthwhile aim in itself and is undertaken first. Thereafter, training is offered in either livelihoods or some form of income-generating activity. There are no systematic connections between the two components.
3. Livelihood training or income-generation activities leading to literacy. In this sub-category, groups start out learning to develop a busi-

ness but come to recognize that their progress will be frustrated, unless they learn to calculate more comprehensively, record their incomes and outgoings and read their records. The content of the literacy and numeracy grows out of the livelihood and income generation.

4. Livelihood and income-generation activities and literacy integrated. In this sub-category, training in a livelihood and instruction in literacy and numeracy begin simultaneously, often with the content of the literacy derived from or influenced by the livelihood.
5. Literacy and livelihood and income-generation activities taking place in parallel but separately. Programs in this sub-category recognize the importance of both components, start both simultaneously, but omit to develop any systematic connections between them.

The first two sub-categories fall within literacy-led programs, the third and fourth fall within livelihood-led programs, while the type of programs of the fifth sub-category would depend on their origins and emphasis.

Findings in Summary

The report yielded 17 findings.

1. In all the countries studied, the diversity of possibilities for improving established livelihoods and developing new ones appears so wide as to demand extreme flexibility, imagination, and resourcefulness.
2. All the programs examined dealt with very poor people, mostly rural and mostly women.
3. Examples of effective efforts were found in each of the five program sub-categories. Success in both sets of immediate objectives is likely if two conditions are satisfied: first, the program is well run with competent, reliable, and adequately supported instructors and, second, the program is well adapted to the interests and conditions of its participants.

   Data were not available on the impacts of livelihood training on production, productivity, and standards of living. However, there was virtual unanimity in both individual and focus group discussions that people who had completed literacy courses tended to be more confident and more willing to take initiatives in developing their livelihoods or in taking an active interest in the operations of their cooperatives. Claims by successful learners that they were now following more productive agricultural or livestock practices were common, as were claims that people felt they could no longer be easily cheated, when they bought inputs or sold produce. These psychosocial aspects are not normally considered in designing vocational education policies. Nonetheless, as they do impinge on the productivity of current livelihoods and on the willingness to seek opportunities to develop new livelihoods, they should be taken into account as desirable and likely effects of literacy training.

4. Education and training programs for very poor adults need to offer very clear, concrete and immediate reasons to justify enrollment and ensure perseverance.
5. Programs that start from livelihood skills seem to stand a stronger chance of success. They can, after all, demonstrate an immediate reason for learning.
6. Organizations that are more concerned with livelihoods and other aspects of development seem to be better at designing and delivering effective combinations of livelihoods and literacy than organizations that are more focused on education. Projects run by NGOs that integrate development and literacy appear most effective. The implication is that policy for vocational/livelihood education with literacy should consider operating through agencies, both governmental and non-governmental, that work with people in their actual livelihoods and employment.
7. NGOs seem to be more flexible than governmental agencies in responding to local and changing needs. Policy-makers for vocational/livelihood education should consider both (a) stronger alliances with NGOs and (b) forms of governmental organization that would allow local offices the kind of wide but accountable discretion that would enable them to develop the required flexibility.
8. Deriving literacy/numeracy content from livelihood skills and integrating it with the livelihood training from the very start seems more

promising than either running the two components in parallel with each other or using standard literacy materials to prepare people to train for livelihoods.

9. Livelihood-plus-literacy/numeracy programs can greatly improve their chances of success, if they incorporate training in savings, credit, and business management, along with actual access to credit.
10. Chances of success are even greater in a program that works with established groups of people who share a common purpose, rather than with individual applicants. In the absence of such groups, it would probably still be better to take the time to identify promising common purposes and to work on forming new purpose-driven groups than to resign the program to unconnected individuals.
11. Early evaluations of the Somaliland Education Initiative for Girls and Young Men (SEIGYM) use of vouchers to buy their training are very favorable. Further observation of the initiative seems desirable, particularly regarding its suitability for established groups.
12. Experience seems to have produced a strengthening consensus that programs that are well negotiated with their prospective learners in association with local authorities and leaders are likely to be more effective than programs that are simply put on offer.
13. While differing levels of proficiency in different livelihoods require different periods of learning, the minimum period needed by a really illiterate person with normal learning abilities to attain a degree of literacy and numeracy sufficient to support advancement in a livelihood seems to be some 360 hours of instruction and practice.
14. The broad experience of income-generating projects suggests that arranging for both livelihood specialists and literacy instructors is more prudent than relying on literacy instructors to undertake livelihood instruction or income-generating activities in addition to teaching literacy and numeracy. The broad trend appears to be to treat literacy instructors on a similar basis to livelihood specialists and to pay them for their efforts.
15. On the important issue of financial resources, data on costs were largely absent, so that the study can offer no guidance on the is-

sue. The only observations possible are that (a) the costs of programs that combine livelihood, business, and literacy skills are likely to be higher than those of simple literacy programs; and (b) even so, the costs would not be inordinate.

16. To achieve financial sustainability, poor countries would need an alliance of government, non-governmental and community organizations, and people of goodwill and energy to set up (a) a mechanism to mobilize local voluntary supplements to fiscal provisions, (b) long-term consortiums with external donors, and (c) support from international lenders.
17. Going to scale would require capacity-building, decentralization, gradualism and underpinning by local infrastructure, natural and other resources, norms, and institutions.

Recommendations in Summary

Overall, the evidence suggests that it would be worthwhile for vocational or livelihood education policy-makers to develop livelihood training with literacy/numeracy instruction for very poor, non-literate people, who tend to be mostly women, and, in Sub-Saharan Africa, mostly rural. The ten recommendations below give guidance on how this could be done. Justifications and further discussion are given in Chapter 8.

1. Vocational education policy should provide for assessments of what would be needed in particular localities to ensure an environment that would enable training in particular livelihoods actually to result in higher productivity, incomes and well-being.
2. Vocational education policy should pursue a strategy of decentralization and capacity-nurturing that will permit resourceful responses to local actual and potential patterns of livelihood.
3. Vocational education policy should provide for courses that combine savings and credit training with negotiated livelihood content and literacy/numeracy content derived from, but not limited to, the vocabulary of the livelihood. As a tool to strengthen the negotiating power of prospective learners, the experience of SEIGYM (the

Somaliland Education Initiative for Girls and Young Men) warrants monitoring.

4. The fourth recommendation is twofold. First, to ensure that the "average" adult learner masters literacy and numeracy well enough to use them in support and development of a livelihood, the literacy component of a livelihood course should offer at least 360 hours of instruction and practice (the livelihood and business components will of course require additional appropriate time). Second, to help optimize perseverance, completion, and retention of learning, the course should be offered in a single session or term, if at all practicable.
5. The fifth recommendation is again twofold. First, vocational education policy should provide for two cadres of instructors – livelihood instructors and literacy instructors. While neither should be a permanent cadre, their patterns of recruitment, training and support can differ from each other. Second, both cadres should be remunerated for the instruction they give.
6. Vocational education policy for non-literate poor adults should promote active, participatory, and interactive forms of instruction and learning in both livelihood and literacy components of training.
7. Vocational education policy-makers should support further research on the issue of costs.
8. Countries should form local alliances of government, non-governmental and community agencies and energetic people of good will to (a) raise local fiscal and voluntary financing, (b) form appropriate consortiums with external donors and (c) attract resources from international lenders.
9. Strategies of capacity-building, decentralization and gradualism should govern the process of going to scale, with due attention to local infrastructure, natural and other resources, norms, and institutions.
10. Any review of vocational educational policy should exert itself to identify, locate, and capitalize on the empirical experience and expertise that those organizations have accumulated, and make it more readily accessible than this study has found it.

2 Prologue

Before discussing the main study, a simple background note is desirable to clarify three points: the current linking of livelihoods with literacy, what is meant by livelihoods, and what is meant by literacy.

Livelihoods and Literacy

This section offers a historical or evolutionary perspective on the relationships between livelihoods and literacy. Adult educators have accepted for at least the past half century that the skills of literacy are not ends in themselves but need to serve some purpose and practice that is important to their users. The attempts to tie them closely to and even derive them from livelihoods began at least three decades ago with UNESCO's pioneering attempt to integrate literacy and livelihoods in its Experimental World Literacy Programme, after the Teheran Conference in 1965. That is when the term "functional literacy" came into currency. So successful was the idea of such integration, that, even with the rise and rapid spread of Paolo Freire's "conscientization" a few years later, it would be difficult to locate a contemporary or recent literacy course that did not claim to be functional, even if it did not claim to prepare its participants for a livelihood. In Kenya (Mwangi 2001) as early as 1969, literacy instructors were expected to assist their classes set up income-generating projects and to invite technical officers in to help deepen knowledge, understanding, and skills. In Guinea, livelihoods and literacy are now so closely entwined that it is no longer realistic to speak of two approaches there (Diallo 2001). Uganda's national program is known simply as FAL, Functional Adult Literacy Program, while Ghana's is the Literacy and Functional Skills Program.

For their part, vocational educators have long accepted that, without a sufficient mastery of reading, writing, and calculation, learners cannot take more than limited advantage of possibilities to enhance their knowledge, skills, and capacities. For example, FAO (1980) had this to say: *"Thus, the concept that the stepping up of farm production by new technology must have training and literacy as part and parcel of the development process, and conversely, that training and literacy as an* *isolated process are of little avail in a developing society, is now well established."* More recently, ILO, working in Nigeria on income-generating activities for women in health development, reported, *"functional literacy should be included... to increase the impact of training in new skills and technologies"* (p. iii) and "In parallel... training in record/bookkeeping, accounting, costing, pricing ..." (p. 5) (ILO 1994 [B]). Similarly, a multi-country study on the benefits of training for women observed: *"While many of the women showed a great capacity for mental calculations and some an astute business sense, they remain relatively powerless in the world of business if they have no written records"* (Leach et al., 2000, p.109).

From a somewhat wider perspective, some quotes from Easton (1998) are pertinent and reinforcing:

> *"Without introducing the technology of writing and effective literacy – in whatever language or script it may be, and acquired by any available type of education – training and assumption of new development functions both tend to remain stuck at the most rudimentary level of technical skill and the most incomplete forms of participation"* (p. xix). *"The training necessary to support self-governance initiatives is not, of course, limited to literacy instruction – far from it. But if the 'tool of writing' constitutes a threshold of effectiveness in the management of local institutions, mastery of this code is equally important as a means of magnifying the scope and the impact of the training"* (p. xxiii).

In a balanced review of educational research in West and Central Africa, Maclure (1997, pp. 86-87) points, on the one hand, to the evidence that nonformal literacy training is strongly linked to improvements in several domains, including agricultural production and other revenue-generating skills, as well as enhanced managerial skills among members of agricultural cooperatives. On the other hand, he notes the frequency with which literacy and other training for poor, unschooled adults disappoint their sponsors and beneficiaries through poor implementation.

What has prompted the current study is the need to assess what seem to be the most effective strategies and methods for ensuring that the skills of literacy and numeracy do support the struggles of the very poor to develop livelihoods sufficient to lift themselves out of poverty.

Defining Livelihoods and Income-generating Activities

Livelihood: Because this report is contributing in the first instance to a review of vocational and technical education, it treats the term "livelihood" in its traditional, restricted sense of simply making a living, rather than in the recently expanded senses initiated by researchers at the Institute of Development Studies, Sussex[1], and adapted by some bilateral and multilateral agencies and international non-governmental organizations. More specifically, "livelihood" in this report restricts itself to the knowledge, skills, and methods used to produce or obtain the food, water, clothing and shelter necessary for survival and well-being, whether the economy is subsistence, monetized, or a mixture of both. "Livelihood" seems more appropriate than either "employment" or "income-generating activities", because the majority of people in Africa who participate in programs with literacy components derive their living mainly from subsistence agriculture, and often from the exchange of goods and services, rather than from earning wages or salaries. A livelihood can include more than one set of knowledge, skills, and methods. For instance, in an agrarian economy, a woman may earn her family's livelihood by combining subsistence agriculture and horticulture on a small plot of land with remunerated labor on a neighbor's land and with selling some of her produce as processed food in a local market.

Income-generating activities: Because most economies are now monetized, the terms "income-generating activities" and "income-generating projects" occur frequently in discussions of literacy projects and programs. They are not synonymous with "livelihood", for the available literature suggests that they often – but do not always – generate only small incomes to supplement main livelihoods. Further, the literature gives the impression that, in most instances, income-generating activities do not involve much systematic training, in ways that courses of vocational and technical education would. Instead, a learning group usually seems to undertake an activity that is common, well known and established in the neighborhood and for which little additional instruction is given.

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[1] "A livelihood comprises the capabilities, assets (stores, resources, claims, and access) and activities required for a means of living: a livelihood is sustainable which can cope with and recover from stress and shocks, maintain or enhance its capabilities and assets, and provide sustainable livelihood opportunities for the next generation; and which contributes net benefits to other livelihoods at the local and global levels and in the long and short term." Chambers R. and G. Conway, 1992, Sustainable rural livelihoods: Practical concepts for the 21st century, IDS Discussion Paper 296, Brighton, Institute of Development Studies at the University of Sussex.

In the main, then, this report will prefer the term "livelihood" rather than "income-generating activities". A report on a project in Egypt makes this important distinction:

> *"Quite often the needs assessment identified the need for income-generation opportunities of which vocational training might be a part... An additional challenge is not to confuse income-generation with vocational training. Both are often important, but people developing vocational skills often need further support (such as with credit schemes and marketing) to be able to generate income"* (UKDFID 1999[b] para. 8.4.3 and 8.4.8).

In short, livelihoods and livelihood/occupational training are not quite synonymous with income-generating activities, even if the latter do require some training.

Clarifying Literacy and Numeracy

At the most basic level, literacy entails simply the skills of (a) recording information of some kind in some code understood by the person making the record and possibly by other persons in some more or less permanent form and (b) decoding the information so recorded. That is the essence of writing and reading. Similarly, numeracy is the skill of using and recording numbers and numerical operations for a variety of purposes. During the past 5,000 years or so, the human race has developed these skills into systems that reach far beyond the simple recording of information. The systems now range from personal signatures through to the mazes of legal documents and higher mathematics. In this, they entail ranges of skills, usages, customs, and conventions in both recording and decoding information, which are conditioned by the particular contexts where they occur. These ranges and varieties have made defining literacy and numeracy in operational terms more than just difficult: UNESCO has been struggling with the task for half a century and has still not been able to bring its Member States to a consensus. Each member operates its own definition for its own purposes.

The attainment of virtually universal primary schooling in the industrialized countries initially led to defining permanent or sufficient literacy operationally as the equivalent of four years of primary schooling. The tendency to use schooling as the standard against which to measure attainments in literacy persisted for some while, despite its increasing inadequacy in the face of shifting average attainments at different levels of schooling in different countries.

In the light of the flux and because it examines situations in a variety of countries and cultures, this study uses no definition of literacy or numeracy. It simply uses the words in whatever sense was used by the program under study. However, as will be seen in Chapter 7 under "Synthesis of Findings from the Two Strategies," the study does attempt to estimate the minimum amount of instruction and practice a person needs to acquire sufficient skill in writing, reading, and calculating to be able to go on to obtaining and exchanging new and possibly complex information to improve the productivity of her or his livelihood. The discussion makes it clear that no hard and fast rule can be laid down. All that is offered is what might be a safe minimum.

3 Objectives of the Study

According to this study's terms of reference, its main objective is *"to derive lessons from programs that have included livelihood skills as part of literacy education and programs that have included literacy skills* *as part of livelihood training. The final report should provide answers to the following questions:*

- *What approaches have been used?*
- *What are the documented outcomes and impacts of these approaches?*
- *What are the lessons regarding management, implementation and resource requirements?*
- *What approaches are likely to be most effective under conditions prevailing in sub-Saharan Africa, and what are the pitfalls to avoid?"*

The fourth question makes clear that the study aims to contribute to policy and practice mainly in Sub-Saharan Africa. ...

7 Synthesis of Findings from the Two Strategies

It is important to remember that the evidence reviewed is not particularly strong, so any inferences necessarily lack a solid empirical base and analytical rigor. Like the "Critical Assessment of the Experimental World Literacy Programme," this study was compelled to offer its findings more as plausible hypotheses than as proven facts. That said, this section broadly aims to provide more grist for the debate on how best to operationalise the concept of lifelong education within a frame of education for all, where "all" includes unschooled and non-literate adults.

1. *Conditions of effectiveness* – The first observation is obvious and almost banal: examples from all five sub-categories of program signal that, whether a program starts from literacy/numeracy and includes some livelihood training, or starts with livelihood objectives and includes literacy/numeracy, it is likely to be successful in both sets of its immediate objectives if it is well adapted to the interests and conditions of its participants and – equally important – well run. *"Quality of the teaching – this was a major factor for the success of a class"* (Crapper et al. 1996, p. 79). That said, the cases of ADRA in Uganda and SODEFITEX in Senegal warn that even the best-run programs will suffer some inefficiency in terms of irregular attendance and dropout. Further, the longer-run outcomes

will not always fulfill all the hopes of the planners and implementers, as shown by the following report on what had been judged a successful project: From Thailand: "*The Local Industrial and Development Center trained 651 villagers in marketing, cost analysis, packaging, export preparation. But the evaluation of 96 graduates found only 27% actually using skills for business, 17% for household purposes, 56% not using the skills at all*" (Itty 1991, p. 48). Concordant with the Thai experience are the findings of the two IIEP studies of 1989 and 1990 in Kenya and Tanzania and the 1999 evaluation in Uganda (Carron et al. 1989, Carr-Hill 1991, Okech et al., 2000). All showed that the knowledge learned by many participants had not changed their attitudes and that even changes in attitude had not necessarily led to changes in behavior. This merely repeats the earlier warning not to place too heavy a burden of expectations on education and training programs.[2]

2. *Motivation* – The second observation, again almost banal, is that education and training programs for very poor adults would be wise to offer very clear, concrete, and immediate reasons[3] to justify enrollment and ensure perseverance, as the following, very typical quote from Ghana confirms: "*We have also seen how important incentives and income-generation activities are for both learners, facilitators and the community as a whole to embrace the program*" (Adu-Gyamfi et al. 1996). A more recent experience in Egypt offers further confirmation in its evaluation report: "*Many illiterate people do not attend literacy classes because they have work to do. The ALTP (Adult Literacy Training Project) team together with the LWGs (Literacy Working Groups) in the villages linked literacy activities to raising the income of the students. New income-generating projects in the villages help attract more students to literacy and link it to their everyday activities. ALTP recognised that literacy, or lack of literacy, is only a part of people's reality and that*

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[2] It may be salutary here to recall that schools, universities, and open universities also fall short of total efficiency.

[3] This observation does not deny the attested fact that many adults learn to read and write for the simple satisfaction of being able to do so, while others learn for religious reasons quite unconnected with considerations of material gain or betterment. However, these motivations on their own have not been sufficient to engage the majority of illiterate adults.

the reasons why people have not previously developed literacy skills are a complex interweaving of lack of educational opportunity, lack of exposure, gender, levels of poverty, culture, lack of self-confidence etc. To help develop literacy skills, particularly of those in poorest sectors of society, and particularly women in this group requires more than the establishing of classes and waiting for people to come. It requires an holistic approach to awareness raising and helping people manage the other challenges in their lives (UKDFID 1999, chapter 8, section 4.1).

3. *Leading from livelihoods* – This observation, which follows reasonably from the second, is that programs that start from livelihood skills seem to stand a stronger chance of success. They can demonstrate an immediate reason for learning. The earlier observations from the western province of Kenya (see Chapter 4, Scope and Methods of the Study) are supported from other countries, as well as from other provinces of Kenya. From Bangladesh: *"... interest in literacy by the rural people was almost nil"* (BNPS 1997, p.30), while Fiedrich (2001) writes of Senegal, *"I have only seen one program, a few years back, of Plan International in Thies, Senegal, where vocational training (tailoring for women) was integrated with literacy. My impression from a two day visit was that the literacy training here was accepted as a hoop that women and girls felt they had to jump through so as to get to the real goodies."* In harmony with this observation, the present study in Senegal concluded: *"Incorporating elements of livelihood training undeniably has the effect of raising the motivation of the learners and ensuring their faithful attendance at the literacy course. It gives a more utilitarian content to the business of training adults."* Similarly, the present Kenya study speculates: *"Part of the success of the REFLECT circles in Kibwezi is attributable to the support Action Aid Kenya accords the circles for income-generating projects. This includes irrigated horticultural production, tree nurseries, goat rearing, poultry keeping and basket weaving. These projects have tended to provide a critical binding action for the groups and their participation in the literacy program is noted to be high. This has also significantly improved the men's participation rate in the liter-*

acy centres" (Mwangi 2001). Again, the same study notes that 11 of 15 focus discussion groups linked literacy with starting and managing small businesses and farming. *"Literacy would help them keep proper records, calculate profits and use different measures correctly. One group observed that, if learners were taking practical subjects like animal husbandry, book keeping and child care, they would be more motivated to enrol."* At the risk of belaboring the point, a final quote from the Kenya study is pertinent: *"Fourteen out of 16 dropout respondents said that they would be willing to go back to the literacy class, if such [income-generating] projects were started."*

4. The fourth observation ties in with the idea of *"livelihood leading"*: Organizations that are more concerned with livelihoods and other aspects of development seem to be better at designing and delivering effective combinations of livelihoods and literacy than organizations that are more focused on education. FAO, IFAD, and ILO are examples among the multilateral organizations, while for most NGOs, literacy and numeracy are only means to larger ends. As the Guinea study notes, NGO-run projects that integrate development and literacy achieve the most effective, really functional literacy, based as they are on the problems and needs of the target groups. They have all begun by undertaking a socio-economic survey of the localities where they start work, and they often address organized groups in their localities. This observation implies that policy-makers for vocational/livelihood education with literacy should consider operating through agencies, both governmental and non-governmental, that work with people in their actual livelihoods and employment, rather than through centers that purport to train for, but tend to be detached from, "the real world".
5. *Flexibility* – In all the countries studied, the diversity of possibilities for improving established livelihoods and developing new ones appears so wide as to demand extreme flexibility, imagination, and resourcefulness. NGOs seem to have more flexibility than government agencies to respond to local and changing needs. Developers of national policy for vocational/livelihood education should emphatically consider stronger – but not dominating or crip-

pling – alliances with NGOs. At the same time, they should explore forms of government organization that would allow local offices the kind of wide, but accountable, discretion which would enable them to develop the required flexibility.

Further, two facts suggest that even the private sector might be induced to offer livelihood and literacy training for poor people in certain contexts. First, patterns of apprenticeship exist in a number of African countries, particularly in the west of the continent. If master craftsmen provide training in return for modest fees and labor, they may be open to paid partnerships with literacy instructors. Second, private training institutes are emerging in a range of crafts and skills, as evidenced by the "professionalizing" literacy centers in Guinea. Arrangements could be developed to suit the interests of both instructors and learners. What the specific possibilities might be in operational terms will of course depend on specific localities and cultures.

6. *Derivative literacy* – The experiences of ACOPAM and SODEFITEX, along with a provisional comparison between WEP/N and WEEL in Nepal, hint that deriving literacy/numeracy content from the livelihood skills in view and integrating it with the livelihood training from the very start seem more promising than either running the two components in parallel or using standard literacy materials to prepare people to train for livelihoods.[4] This suggestion does not discount the experiences of the Rukungiri Women, ADRA, Saptagram, RDRS, and the Notre Dame Foundation, which all use literacy primers unrelated to livelihood content; it merely points to a possible further advantage in engaging the learners' perseverance.
7. *Savings and credit* – Livelihood-plus-literacy/numeracy programs can substantially reinforce their chances of success if they can start from or at least incorporate training in savings, credit, and business management, along with actual access to credit. Although ADRA and SODEFITEX provide the credit, WEP/N, WEEL,

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[4] This point concords with Mikulecky & Lloyd's observations in Canada that people with relatively low levels of schooling tend not to transfer literacy skills spontaneously from one domain to another (Mikulecky & Lloyd, 1993).

and other organizations demonstrate that it can be created among the very poor themselves, without the agency of a micro-finance institution.

8. *Group approaches and negotiation* – Again drawing on the experience of ADRA, ACOPAM, WEP/N, and WEEL, chances of success are also heightened by working with established groups of people who share a common purpose, rather than with individual applicants. In the absence of such groups, it would probably still be better to spend time identifying promising common purposes and to work on forming new purpose-driven groups than to carry out the program with unconnected individuals.

   Experience seems to have produced a strengthening consensus that programs that are well negotiated with their prospective learners in association with local authorities and leaders, are likely to be more effective than programs that are simply put on offer. Further, there is a longstanding consensus that teaching methods that encourage activity and interaction between participants and their instructor are more effective than those that leave the instructor with most of the action. However, it is important to acknowledge observations that implementing the active methods is often beyond the competence and inclination of the instructors, and quite often it is not to the taste of the learners themselves. Despite such non-modern attitudes and practices, appreciable learning can and often does occur.

9. *Vouchers* – There are very favorable early evaluations of the initiative by the Somaliland Education Initiative for Girls and Young Men to use vouchers as a means to give very poor people more power to negotiate what they learn and with whom they learn (Tomlinson, 2001). That suggests the project merits further observation, particularly regarding its suitability for already established groups.

10. *Time on task* – The projects examined offer no decisive answer to how much time is needed to enable a person to become permanently or sustainably literate. Recall that the Mahila Samakhya experience found that 180 hours of tuition, even of intensive instruction, led only to fragile literacy skills. ADRA seems to be satisfied with 250 to 300 hours, whereas SODEFITEX arranges for 400

hours. To help clarify the issue, Medel-Añonuevo looked at four models of literacy and livelihood programs in Nepal:

Model 1 offered a 12-month literacy course, followed by a 3-month vocational course and the establishment of a community reading centre.

Model 2 offered an 18-month course in 3 phases: first, a 9-month basic literacy and numeracy course, then, a 6-month course learning the livelihood skills (the functional phase), and finally, a 3-month course in actually generating and managing income.

Model 3 offered simply a 6-month basic literacy course, then encouraged its learners to seek livelihood training from other sources.

Model 4, which was most favoured by practitioners, started with women's saving and credit groups, encouraged the development of income-generating activities, offered a 6-month basic literacy course, followed by either 3 months' follow-up in both literacy and income-generation, or 6 months of more advanced training (1996, p. 51). The overall perceptions were that six months are insufficient for most men and women to develop satisfactory skills in reading, writing and calculating and that the need to link these skills with some form of income-generation was strong.

A Syrian project went further and concluded: *"The 9-month duration of a literacy course is not sufficient to allow learners the mastery of basic literacy skills"* (UNDP 1992). Yet a project in Afghanistan found, *"Experience has shown that after 9 months of classes meeting 2 hours a day (some 350-400 hours in all) women can be brought to a fourth grade reading level."* (USAID 1994) Ignoring differences of language, alphabets, literateness of environment, and levels of previous or other literacy among the learners, it would seem safe to reckon that the minimum time for developing skills in literacy and numeracy adequate to support livelihood and other development is 360 hours, plus more hours of learning and practice. Beyond that minimum, the duration of courses would depend on the complexity of the livelihood skills to be learned or developed.

11. *Cadres of instructors* – The broad experience of income-generating projects suggests that arranging for two cadres of instructors, one for livelihoods, the other for literacy, appears to be more prudent than relying on "generalist" literacy instructors to undertake livelihood instruction or income-generating activities in addition to teaching literacy and numeracy.
    There is no argument about the need to train, support, and re-train the literacy instructors. However, there is a weaker consensus about how they should be recompensed for their contributions. Most of the programs reviewed make it clear that most literacy instructors do not have much schooling themselves, are not in steady or waged employment, and are themselves among the poorer of their societies. Naturally, they appreciate being paid in cash or kind. Most of the programs examined in this paper do offer pay, some at modest, others at more generous levels. Overall, it seems that NGOs are more inclined than governments to offer regular pay, rather than occasional moral or material awards. Some, like FAO's Farmer Field Schools, follow the principle that "user pays" and expect the participants to negotiate the recompense with their literacy instructors (even though the agricultural instructors are paid employees of the program). A few other programs rely on the literacy instructors being pure volunteers, especially where they are recruited and selected by their own participants from among the local community. Overall, the broader trend appears to treat literacy instructors on a basis similar to livelihood specialists and to remunerate them for their efforts.
12. *Costs* – Very little information on gross or unit costs was found in the documentation available. However, on the basis of two programs, supplemented by inferences from observation, we believe that the unit costs of the programs we have studied are quite low. The Uganda FAL reckoned a unit cost of US$4-5 per person enrolled. A project in Senégal, supported by Canada, estimated that the cost per enrollee would be approximately CDN$20. However, faulty implementation raised the cost to CDN$45 per enrollee

(CIDA 2001, p.13). FAO's People's Participation Programme had some 13,000 male and female participants in 12 countries. The average cost per participant was estimated in 1989 to be US$63 (FAO 1990, p. 36). All that can be observed here is that even the highest estimate does not appear inordinate.

That said, policy-makers in vocational/technical education need to bear in mind that, just as voc/tech education in schools and colleges is always more costly than general education, so analogous education for adults in villages and shanty-towns will unavoidably be more costly than simple literacy programs. In the cases of SODEFITEX, WEEL and WEP/N, which combine livelihood skills and the three Rs with training in savings, credit, and business management and development, considerably more is involved than simple literacy. In turn, teaching these skills will call for cadres of well-trained specialists, who will without doubt expect commensurate payment. Further, supporting them, as well as holding them to account – without necessarily employing them on a permanent basis – will require a soundly devised administrative structure.

13. *Elements of cost* – Although no specific suggestions are possible here, it may be helpful simply to supply a non-exhaustive list of program costs, without specifying how they are to be apportioned:

Learners: learning materials, learning supports like space, lighting, heating.

Instructors for livelihoods and for savings, credit, business management and business development (on the assumption that they already have expertise in these subjects): remuneration, travel, subsistence, instructional materials, initial training as instructors, refresher training.

Instructors/facilitators for literacy/numeracy and also for rights, responsibilities, civic, health and other topics in demand: remuneration, initial training, instructional and recording materials, refresher training.

Specialists for identifying new business opportunities (on the assumption that they already have the expertise): remuneration, travel, subsistence.

Trainers/technical supporters (whether community-based, contracted or public personnel): remuneration, training (initial and refresher), travel, subsistence.

Supporting administrative infrastructure (for production, storage, distribution, travel, payments).

Supporting infrastructure for monitoring (plus quality assurance in learning, attainments, application).

14. *Financial sustainability* – Given that the potential clientele for livelihood-with-literacy/numeracy programs is currently large and likely to remain large for a long time, and given the perspective of continuous, lifelong education, the issues of cost require consideration of financial sustainability. Here, the policy-maker needs to bear in mind that, even at fee-exacting universities, few, if any, students, however affluent, meet the full cost of their education. Tuition fees usually cover only a proportion of the full costs of tuition. Since programs that include basic literacy and numeracy always have as their major clients people who are among the poorest of the poor, they will require proportionately more substantial subsidies from external sources, whether public or private. This will hold true whatever the measures to minimize dependency and expectations of free handouts, and whatever the measures gradually to reduce subsidies and move to higher proportions of local self-finance.
However, the poor are not homogeneous. They can range from the destitute, who need a total subsidy, to those like the women of Rukungiri and participants in some of the Farmer Field Schools, who may be just above the poverty line but still able to contribute to the costs of their education. Further, the cases of WEEL and WEP/N suggest that groups of even very poor women can in a relatively short time mobilize their own savings and begin to pay for what they want. Thus, the proportion of subsidy could in principle vary from group to group, and, for particular groups, from time to time. Operating with such sensitivity and flexibility could well be beyond the capacity of a single central authority. However, decentralized approaches that set minimum standards but permit local adjustments to accommodate local conditions, communities, or groups could be feasible.

It is also true that the countries whose people could benefit most from livelihood-with-literacy/numeracy education are among the poorest and least able to provide subsidies from local sources, whether public or private. The cases considered earlier have shown that, even where local public and private resources have combined and been amplified by international official and non-governmental development assistance, they have still been insufficient to cover more than a small proportion of the potential clientele. On the other hand, the cases from Bangladesh, Guinea, India, Nepal, the Philippines, Senegal, and Uganda suggest that NGOs, both local and international, can and do sustain themselves and their programs over long periods, apparently at least to the sufficient satisfaction of their supporters.

If the government of a poor, indebted country, in alliance with non-governmental and community organizations, and people of good will and energy, aimed to make livelihood-with-literacy/numeracy education available to substantially larger proportions of poor people and to maintain long-term financial sustainability, it would need to take three steps. First, in addition to fiscal allocations, it would need to develop a mechanism to mobilize local voluntary contributions to a special fund or even network of funds (village or community). Second, it would need to form large-scale and long-term consortiums with international donors, both official and non-governmental. Third, the government would need to persuade international lenders, like the World Bank, its regional counterpart, the Islamic Development Bank, and the International Fund for Agricultural Development that investments in livelihood-with-literacy/numeracy education would, in time, both reduce poverty and strengthen its ability to repay its debts.

15. *Going to scale* – Normally, vocational and technical education policies are not associated with programs of mass education. Yet the numbers of very poor people working in livelihoods that could be made more productive, force the question whether education in livelihood-with-literacy/numeracy can be conceived in mass terms. Clearly, the cases of SODEFITEX, WEEL, and WEP/N reflect the recognition that larger-scale programs are necessary and that

strategies to achieve larger scales need to be devised. SODEFITEX chose an analogue to a "point-line-network," whereby it started with educating just a few members per cooperative, then one member per farming family, then gradually included more and more people. WEEL and WEP/N selected a strategy of working through more and more local organizations to reach more and more groups of women. In five to six years, they reached and helped 10,000 and 130,000 very poor people, respectively. For projects that have harnessed the teamwork of only small NGOs, these scales, and the time-scale within which they were achieved, command respect.

In all three cases, the initiative was taken very carefully and gradually by a relatively small agency at a very local level. Yet the strategy of gradualism has not demanded an inordinate amount of time to attain a significant scale. These features point once again to the desirability of decentralized approaches that permit local organizations, whether public or private, to assess the pace and manner at which expansion can be soundly undertaken.

An additional factor counseling decentralization and gradualism is the complexity of the package needed to support livelihood-with-literacy/numeracy education. Developing the depth of capacity to support widespread instruction in a large range of livelihoods in a variety of environments, plus the necessary skills of fostering savings, credit, business management, and business development, requires not only time, but also careful amassing of local knowledge.

Finally, the findings of the PADLOS study of decentralization (Easton 1998) would counsel that assessing when to go to scale in a particular locality must take into account local infrastructure, natural and other resources, norms, and institutions.

8 Conclusions and Recommendations

This chapter attempts first to use the programs reviewed to suggest pointers for policy and practice in vocational/livelihood education for unschooled adults and adolescents in the countries of Sub-Saharan Africa. More broadly, it aims to inform thinking and discussion elsewhere on how best to implement the concept of lifelong education within a framework of education for all, where "all" includes unschooled and non-literate adult women and men in both rural and urban areas and in both waged employment and self-employment in monetized and subsistence sectors of an economy. The nature and quality of the documentation and other information available limit the force of the pointers and suggestions.

Overall, the evidence suggests that it would be worthwhile for vocational or livelihood education policy-makers to develop policies that offered livelihood training to non-literate, very poor adults, especially women, who are unable to access knowledge and skills that might relieve their poverty.

Enabling environments – Knowledge and skills by themselves cannot guarantee a decent livelihood. As UNDP/UNESCO (1976) and the IIEP evaluations of the literacy programs of Kenya and Tanzania in 1989 and 1990 suggest, the economic environment must be supportive. Indeed, Easton (1998) suggests that local norms, broader institutional factors, local resource endowments, infrastructure, and sources of finance all need to be favorable before education and training can be fully fruitful. Easton's view is supported by the approaches of ADRA in Uganda, SODEFITEX in Senegal, SEIGYM in Somaliland, and WEP and WEEL in Nepal, which have all found it necessary to include institutional development as a constituent of their programs.

If these organizations, most of them in Africa, have found it possible to design and implement packages of livelihood training, literacy instruction, and institutional development, vocational education policy should be able to do the same. Further, while most of these organizations have needed to adopt relatively short-term perspectives for any given locality, national policy should be able to take the longer view of SODEFITEX and to plan in terms of decades rather than three to five years.

The first recommendation is that vocational education policy should assess what would be needed in particular localities to ensure an environment that would enable training in particular livelihoods actually to result in higher productivity, incomes, and well being.

Strategy for diversity – The livelihoods and sets of livelihoods that the very poor undertake are notably diverse. So are the environments in which they work. So, too, are the possibilities of enhancing those livelihoods and developing new ones. Managing these diversities calls for flexibility, imagination, and resourcefulness, and for institutions that can respond appropriately. It points ideally to a strategy that will

- allow for considerable decentralization and delegation
- first follow existing demand, then seek out latent possibilities of new links with the mainstream economy, from which could arise new demands
- foster flexibility and mobility
- rely on and nurture freelance specialists in business and livelihood development
- operate through institutions and procedures of complete transparency and public accountability.

Such a strategy will avoid reliance on packages of standard curricula in fixed training centers with fixed equipment and permanent corps of specialists.

Capacities – High-quality analysis, design, implementation and support are required. *"To be avoided is a weak response in the form of low levels of analysis and design, and inadequate supervision"* (Middleton & Demsky 1989, p. 101). Ballara shows the complexity of what is required:

> *"Certain precautions should be taken when income-generating activities are included in literacy programs. Results obtained during the 1980s show that these activities have to be treated as enter-*

> *prises related to the requirements of mainstream economic production, offering continuity and remuneration to the participants. To avoid becoming involved in poorly-rewarded activities, literacy programs incorporating an income-generating activity should begin with a study of market needs; they should prepare women in non-traditional sectors and for future entry into the formal sector, rather than be directed towards traditional low-level skills which barely supplement home income and which finally becomes a type of welfare"* (Ballara 1991, p. 47).

A strategy of decentralization and delegation must presuppose the capacity to diagnose current needs, detect future opportunities, and design and deliver high-quality training. Where such capacity cannot be assumed, capacity-building strategies with appropriate incentives and inducements must be developed. As the present study attests, in a large number of countries, the voluntary and non-profit sectors at international, national and local levels have responded well to incentives and capitalized on opportunities to deepen and expand their capacities. It is possible, too, that private, profit-making vocational education specialists – already detected in the Guinea study – may see opportunities to help themselves as well as the poor. At the same time, experience in several countries suggests that, where these sectors are weak, gradualist strategies to increase their capacities would be prudent.

If public resources are to be used to promote the decentralization and delegation, supervisory mechanisms are needed to ensure that they are properly applied and that the intended beneficiaries do indeed enjoy a proper quality of instruction. One increasingly well-known model for such mechanisms is the "Faire-faire" strategy of Senegal (Diagne & Sall 2001[5]). Of course, the supervisory mechanism should be so designed that it does not actually obstruct, rather than promote, the decentralization.

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[5] The faire faire strategy, supported by the World Bank, is not discussed in this paper, as the Senegal study found that it was not yet linked to either livelihood training or to income-generating activities.

The second recommendation is that vocational education policy should pursue a strategy of decentralization and capacity-nurturing that will permit resourceful responses to local actual and potential patterns of livelihood.

Savings, credit and content – As for actual courses of vocational education, this review suggests three pointers. First, because the learners are very poor, the approaches of ADRA, SODEFITEX, WEEL, Saptagram, and WEP/N indicate that immediate connections and access to sources of credit should be a component of every livelihood training program, without necessarily involving a special micro-finance institution. SODEFITEX, WEP/N, WEEL, Saptagram, and other programs supply models for encouraging savings as a means to create the resources for credit for business development and ensuring discipline in repayments. Special micro-finance institutions are not essential. However, in such situations, the expertise for helping groups mobilize savings and manage them through lending and recovery needs to be very reliable.

Second, there is a consensus that the actual content of a livelihood-with-literacy/numeracy course should be the result of a local survey and negotiations with the prospective participants. At the same time, current demand in a locality should form only the initiating basis for training in livelihoods. Opportunities for new livelihoods and businesses, especially those that would help people move into the economic mainstream, would need to be sought and demands stimulated for training to undertake them. In connection with this point, to strengthen the negotiating hand of would-be participants and to encourage accountability among instructors, the idea of vouchers, as used by the Somaliland Education Initiative for Girls and Young Men, merits observation and exploration.

Third, the literacy/numeracy component should, in the initial stages of the training, be subordinated to the language and idioms of the livelihood and business skills, in the manner that WEP/N has selected. As educators in Melanesia have shown (ASPBAE 2000[a]), and as the

REFLECT approach has pioneered, instructional materials can be readily fashioned for particular languages, idioms and localities. This recommendation does not of course imply that the literacy/numeracy component should be restricted throughout the course to the discourse of the livelihoods in question; that would undermine the wider uses of the skills in other dimensions of daily life (recall Mikulecky's observations that spontaneous transference did not occur). A report on a current project in Egypt notes: *"Women attending groups and classes which treated them as whole persons reported major changes in their lives: skill development, greater income-generating opportunities and confidence development"* (UKDFID 1999, para 8.4.5).

Our recommendation does, however, urge that the experiences of ACOPAM, SODEFITEX, and WEP/N be used as capital to construct more effective programs.

The third recommendation is that vocational education policy should provide for courses that combine savings and credit training with negotiated livelihood content and literacy/numeracy content derived from, but not limited to, the vocabulary of the livelihood.

Time on task – One of the most common observations in adult education, particularly in programs for very poor women, is the difficulty of maintaining regular attendance and of sustaining attendance over long periods. Against this is the need for adequate "time on task" in both the livelihood and the literacy/numeracy components. As noted earlier, although there is no firmly settled opinion on the minimum time needed on average to attain "sustainable" or permanent literacy and numeracy, a safe minimum would be 360 hours of learning and practice. To that minimum has to be added the time needed to teach the required livelihood and business skills.

Most literacy and livelihood programs now strive to negotiate their class times with their participants to minimize inconvenience and opportunity costs. Even so, if the daily commitments of the participants made a single stretch of time difficult, then the phased or modular approach used by WEP/N and WEEL (as well as the ILO's use of Modules of Employable Skills for more than 20 years) might be used to encourage attendance and perseverance. Nonetheless, the SODEFITEX experience suggests that this could be a second-best solution Further, because many participants, however well intentioned, do miss sessions and attend irregularly, a margin of as much as 20 percent might be worth adding to the duration of a course. That would allow such participants some room to catch up, while affording the more regular some more space for practice and reinforcement.

The fourth recommendation is twofold. First, to ensure that the "average" adult learner masters literacy and numeracy sufficiently well to use them in support and development of a livelihood, the literacy component of a livelihood course should offer at least 360 hours of instruction and practice (the livelihood and business components will of course require additional appropriate time). Second, to help optimize perseverance, completion, and retention of learning, the course should be offered in a single session or term, if at all practicable.

Instructors – The effectiveness of a course will stand or fall by its instructors. The experiences discussed in this study counsel against having the lay people who serve as literacy instructors being livelihood instructors or organizers of income-generating activities as well. Lay people who are sufficiently literate can be trained to be effective literacy instructors. However, appropriate specialists seem to be the best people to handle instruction in livelihoods or income-generation. It is of course possible to train livelihood specialists to teach literacy as well. Indeed, the Experimental World Literacy Programme suggested that such people seemed to teach literacy and numeracy more effectively than school teachers. Where such a combination of skills is feasible, it could be worth fostering.

All the programs reviewed place much importance on not only training their literacy instructors but also supporting them closely and continuously, as well as offering them periodic refresher training. In this, they echo the Critical Assessment of the Experimental World Literacy Programme: "*... a consensus seems to have emerged from EWLP concerning the need to give great stress to in-service as well as pre-service training of instructors*" (UNDP/UNESCO 1976, p.135).

As for remunerating instructors, it would seem prudent to follow the majority trend of paying both livelihood specialists and literacy instructors. Where literacy instructors are paid, either by their participants or by the agency organizing the program, they tend to be more accountable, reliable, and regular. This may be one reason why most NGOs choose to offer a salary or honorarium, rather than appeal for voluntary effort.

The fifth recommendation is again twofold. First, vocational education policy should provide for two cadres of instructors: livelihood instructors and literacy instructors. While neither should be a permanent cadre, their patterns of recruitment, training, and support can differ from each other. Second, both cadres should be remunerated for the instruction they give.

Instructional methods – The consensus on teaching methods is that approaches that promote activity and interaction are likely to be most effective, however hard these approaches are to put into practice with instructors who have themselves had only limited traditional schooling. Easton writes: "*Observation at the forty sites strongly suggests that teaching literacy and becoming literate in one's own language or a familiar tongue, and acquiring new knowledge on this basis, are not terribly difficult provided the application of the new knowledge is clear, and the pedagogy progressive and participatory* (1998, p. xxiii).

The sixth recommendation is that vocational education policy for non-literate poor adults should promote active, participatory, and interactive forms of instruction and learning in both livelihood and literacy components of training.

Finance – This study is not in a position to offer any estimates of the financial resources needed (see Chapter 7, subhead "Conditions of effectiveness – Costs" for a brief discussion).

The seventh recommendation is merely that vocational education policy-makers support further research on the issue of costs.

Financial sustainability – As education in livelihoods and literacy is likely to require long-term programs, financial sustainability is a necessity. Although poor people, poor countries, and poor governments will probably be able to meet at least part of the longer-term costs on their own, they are unlikely to be able to shoulder all of them and will need external assistance.

The eighth recommendation is that countries form local alliances of government, non-governmental and community agencies, and energetic people of good will to (a) raise local fiscal and voluntary finance, (b) form appropriate consortiums with external donors and (c) attract resources from international lenders.

Mass scale – The numbers of people who could benefit from education in livelihoods and literacy are sufficient to warrant large-scale programs. However, the complex nature of such programs and the requirement that they adopt local rather than general focuses counsel slow rather than rapid dissemination. The experiences cited suggest that slower dissemination need not involve inordinately long periods.

The ninth recommendation is that strategies of capacity-building, decentralization and gradualism govern the process of going to scale, with due attention to local infrastructure, natural and other resources, norms, and institutions.

Capitalizing on knowledge – The final recommendation derives from the experiences of ACOPAM (ILO), ADRA, the Farmers Field Schools (FAO, CARE, World Education), and the programs supported by IFAD.

The tenth recommendation is that any review of vocational educational policy should exert itself to identify, locate, and capitalize on the empirical experience and expertise that those organizations and others like them must have accumulated in their work in Sub-Saharan Africa and elsewhere; and make it more readily accessible than this study has found it.

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French is the official language in Senegal and hence the language of the formal education system. There are also 22 national languages. The illiteracy rate of over 65%, and a high level of dropout, illustrate the inadequacies of this education system. In this situation, non-formal education in the national languages is becoming an increasingly important element of the initial education system. This article focuses on experiences from this expanding educational sector in Senegalese languages, which is by definition non-formal in approach and status, and which often addresses adults rather than children. In particular it focuses on the spread of a movement for literacy amongst speakers of the Pulaar language, the second largest language group in Senegal, looking at both what motivates them, and what constraints they face. It is based on the experiences of one non-profit organization, Associates in Research & Education for Development (ARED), which publishes books and provides community training primarily in the Pulaar language. Examples and quotations are all taken from various ARED training experiences. Dr. Sonja Fagerberg-Diallo is Director of Associates in Research and Education for Development Inc. (ARED). A longer version of this article will appear in Ulrike Wiegelmann (Hg.): Afrikanisch-europäisch-islamisch? Entwicklungsdynamik des Erziehungswesens in Senegal, under the title "Searching for Signs of Success: Enlarging the Concept of 'Education' to Include Senegalese Languages".

Sonja Fagerberg-Diallo

"Learning to Read Woke Me Up!": Motivations, and Constraints, in Learning to Read in Pulaar (Senegal)

The Educational Context in Senegal: French in Formal Education for Children and Non-formal Education for Adults in Senegalese Languages

The official language of Senegal, both in the administration and in education, is French.[1] However, there are twenty-two "national languages," eight of which have been officially recognized but which are only peripherally used in the education system.

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[1] The new President, Abdoulaye Wade, has announced that this will change, so perhaps the verb should be "has been" rather than "is".

Given that Senegal's current illiteracy rate hovers around 65%, we need to ask some fundamental questions about this education system. What do we know about education in French in Senegal today? Roughly, 62% of children between the ages of seven and twelve are enrolled each year in the French-language school system. But each year at the 7th grade entrance exam, 75% of the students taking the exam are failed and forced out of the education system definitively. A large number of students are failed out of the system at this point in their education simply because there aren't enough places for them in higher educational institutions.

Furthermore, emerging data showing the inadequacies of this system is not only quantitative. Qualitatively as well, we can easily see its weaknesses. In a recently published dictionary of agricultural terminology in an African language (Pulaar), the authors explain that they decided to compile this dictionary after their *"frustrating attempts to transmit scientific knowledge"* in an agricultural extension program. They tell the story of speaking with *"...a young technician at our institute for agricultural research who was in daily contact with researchers there, who constantly spoke with them in French about every detail concerning growing cotton, who carried out experiments for them. And yet one day he admitted that until he had read the version in Pulaar, he had never understood the booklet written in French about the insects which destroy a cotton crop"* (Tourneux and Dairou, 1998, p. 9). As they exclaim, *"If he couldn't understand it, who else possibly could?"*

The formal education system in French is increasingly unable to satisfy the demands of a growing population that wants an education which responds to its needs. Therefore, non-formal education in national languages has become an increasingly interesting option, going back to the early 50's when the first mass literacy campaigns promoted by UNESCO were introduced in Senegal. Fary Ka, university linguist in Senegal, calls national language education *"...an alternative to the failed mi-*

rage of formal education ('schooling') which creates civil servants, élites and intellectuals" (Ka, 1996, p. 11). Today, in the face of high unemployment amongst all school graduates – even at the university level – the alternative of national language education is emerging as an important option.

A "Grassroots Social Movement" for Education in the Pulaar Language

Faced with the weaknesses of the official education system, individuals are turning, as adults, to a non-formal, community-based form of education in Senegalese languages. Furthermore, there exists a particular experience within the Pulaar-speaking community of Senegal that can properly be called a *"grassroots movement for literacy"* in that language. New literates with almost no education volunteer to teach literacy classes in their communities; participants pay a small fee to equip their classrooms; individual learners buy books. As Dora Madden points out, *"In Senegal, Pulaar speakers are known for their motiva-*

Class learning the Pulaar language *Foto: ARED*

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tion to work in literacy, and a large number of people teach literacy classes on a voluntary basis.... Everywhere in Senegal, the Pulaar language has its volunteers" (Madden, 1990, p. 14). According to researcher Marie-Eve Humery, it is *"...the lively personal engagement of Pulaar speakers which is at the origin of this movement in favor of the language. A hard core of 'militants' for both the culture and the language has succeeded in mobilizing the majority of Pulaar speakers"* (Humery, 1997, p. 74).

While the results of this process are often uneven, and problems abound, nevertheless, this spirited community movement is well worth further study. Educators and policymakers can learn some important lessons from this language community. The key to its success is the link which has been forged between *cultural identity, language* and *literacy.* As Madden discovered in an interview with a group of voluntary literacy teachers living on the outskirts of the Senegalese capital city, they felt that they *"...must try to revitalize our culture. Literacy in the Pulaar language is one instrument for reaching that goal"* (Madden, 1990, p. 18). As a reason for becoming literate, this goes against the usual assumption that functionality and economic incentives are essential to motivate learners. Rather, it shows what can be accomplished when culture and education become partners.

No longer does education mean alienation from the community. What seems to be the key element in all these activities is that education in Pulaar has found a cultural echo. The skill of learning how to read and write is not perceived as an alienating factor, but as something which can help local initiatives move forward in both preserving and understanding the culture, and in the integration of new ideas into the existing system.

However, many questions are nevertheless raised about the results achieved with the investments made. Understandably, many literacy programs operate under the burden of having to continually prove their worth by evaluating the progress that participants are making. It is not surprising that funders and administrators of programs are often looking for signs of success that can be measured by tests similar to those they have all experienced as students themselves – even though participants themselves might have very different criteria for evaluating the importance, efficacy, and impact of their classes. And many people are initially discouraged by the so-called "low level" of achievement in these classes. The Senegalese national newspaper once ran a front page article entitled *"Alphabétisation: des résultats en-deçà des investissements?"* (Soleil, August 26, 1999), which translates roughly as *"Are the results of investment in literacy programs worth it?"* The article continues with the observation that *"In spite of the unexpectedly high demand for participation... the actual results are still disappointing: only 50% of the participants can read, only 40% can write and only 28% can do basic math."*

In this article, we go on to look at two factors which should be an important part of this discussion, namely, how do participants evaluate their learning, and how must we evaluate the programs that we offer them?

Personal Motivations for Investing in Literacy

In spite of this general enthusiasm, investing in becoming literate is no small task for most adults. It requires sacrifices in terms of time and money, even a certain humbling of oneself in order to dare to try something totally new in which one is not at all certain of success. How much people sacrifice is poignantly illustrated in the following comments, which were written by women who had attended a month-long intensive literacy course, living together at the site of the training because otherwise they would not have been able to attend. This training took place in a pastoral zone, were these women from mobile herding families could not find time to attend regular community classes during the year, given the mobility of thê group.

- *At first my husband was absolutely against the idea. Finally, he reluctantly agreed to let me go. But I left a lot of unresolved problems behind me. At home, there was no one to pound the millet, no one* *to go get the water, no one to look for firewood, no one to cook. Normally, I do all of that, and I had to leave it behind me.*

- *When I left home, my husband and I were planting. I am the one who normally guides the horse that pulls the plow. So this year, we risk not having a big harvest since we had to stop our work right where it was.*
- *I left my husband with his widowed sister. She is the one who is looking out for my children as well as her own. I have no idea how they are managing to eat during this period before we harvest and when stocks from last year are used up; but I'm here! It is my husband himself who brought me here, and then he returned to take care of the family.*
- *At first, our village was reluctant to let anyone participate in this literacy class. We had three meetings without being able to decide who would go from our village. Finally, my husband decided that I should attend the course. At the time, my youngest son was just weaned, and quite sick. I said I couldn't go unless he was better. But everyone started to encourage me to participate, no matter what. And everyone decided to help me by sending two other women to help at home.*

If getting an education requires such a high degree of personnal sacrifice, what motivates people to make the effort? How do they evaluate the experience? In another similar course, a male participant wrote the following as part of the final evaluation:

> *...This letter is to let you know that this course wasn't easy for me. Everyday I had to leave my normal productive activities, which isn't good for someone who lives off of what he earns daily. Furthermore, every day I had to walk from my home to class [18 kilometers]. Since I don't have any means of transportation, I was very tired... But don't forget that however much I was tired, that is how much I gained from the course! I'd say this course is worth all of the effort, because now I can read and write correctly, and I learned all four math operations...*

Students most often express their motivations and the benefits of attending literacy classes in terms of *impact on their lives*, not in terms of *acquired academic skills*. For example, a recent ARED evaluation of a literacy program uncovered the surprising belief that the presence of a literacy class had cut down on violence in the village. Because the class proposed that young men should check in their "arms"-(knives and machetes) at the door of the classroom, a lengthy discussion ensued about where and why they carried these objects, which they needed as herders, but which also were too often used in personal disputes. Furthermore, people claimed that young people started spending more time studying than playing cards, an activity which could degenerate into conflicts. As a result, members of the class spontaneously responded "less violence and agression" when asked about the impact of literacy in their community, and people were proud to claim that "the pen" had replaced "the sword" (literally "the knife").

The following comments come from the final evaluation of a two-week intensive course for twenty young women who wanted to become literacy teachers. On the last day of the course, they were asked to write a letter to ARED, describing the impact of literacy on their lives. Their responses fell into two categories, either emphasizing the personal empowerment that came with literacy, or mentioning the fact that literacy and literacy classes had increased social interaction and cohesion. Two phrases clearly expressed these two possibilities: *"studying woke me up"* and *"now I dare work in a group"*. These core ideas were fleshed out with many examples of how participants saw the impact of literacy – and literacy classes – on their lives:

"Studying woke me up!"

- *Now I can take notes on all my thoughts.*
- *I now know how to listen and make a choice.*
- *It is only through studying that a person can change.*
- *At first I didn't even know how to write my name. Now I know what I should do with my life!*
- *I now know my own mind, and refuse to be tricked.*
- *From now on, in everything that I do, I will stop first to think about it, and get information about whether it is a good or bad idea.*

- *Studying woke me up, gave me knowledge, and improved my behavior and patience.*
- *What has changed in my life is that now I have become a more humble and forgiving person.*

"Now dare work in a group."

- *Studying gave me the courage to stand in the middle of people and speak the truth.*
- *What has changed in my life is that now I dare sit with the elders, something that I didn't dare to do before.*
- *Whether the other person is old or young, a man or a woman, I now know how we can work together as equals.*
- *Studying improved my social relationships.*

In other words, the skills of reading and writing are imbued with a deep transformational power. They are not just – or even primarily – tools for a utilitarian end.

ARED recently began an educational program in a village which had never had a single literacy class. The resident representative from the Ministry of Animal Husbandry made the following comments on how these activities had affected the village in just a few months. He remarked that:

- *Before, every group (lineage, social group, family) acted in its own interest, tending to exclude others. But now, they are beginning to act in concert around community needs. This is easily observable in the changes in behavior in village meetings.*
- *Ever since this village was founded, women have never – not once – participated in a village meeting. Today, they come in large numbers and even speak out in order to give their opinion.*
- *No one could ever work together because of political tensions and divisions. But they have finally decided to keep politics out of their work for the village. They have created an association named 'Kawral' (Unity), in order to work for the development of their community.*

- *Everywhere you go, whether in households or in public places, you see individuals and small groups of people bent over their books, like a herder who is searching the ground for signs (tracks) of one of his lost animals.*

For those of us who design programs, books and curricula, we would be well advised to keep all these comments in mind. They indicate that people look at becoming literate as a process of personal and social transformation and change, not just as the acquisition of academic – or functional – skills.

The Constraints that these Classes Face

Before we can measure the results obtained by individual participants, we should first evaluate the educational programs that we offer to them. There are several severe handicaps and limitations which are always part of the basic structure of all adult literacy programs, these being:

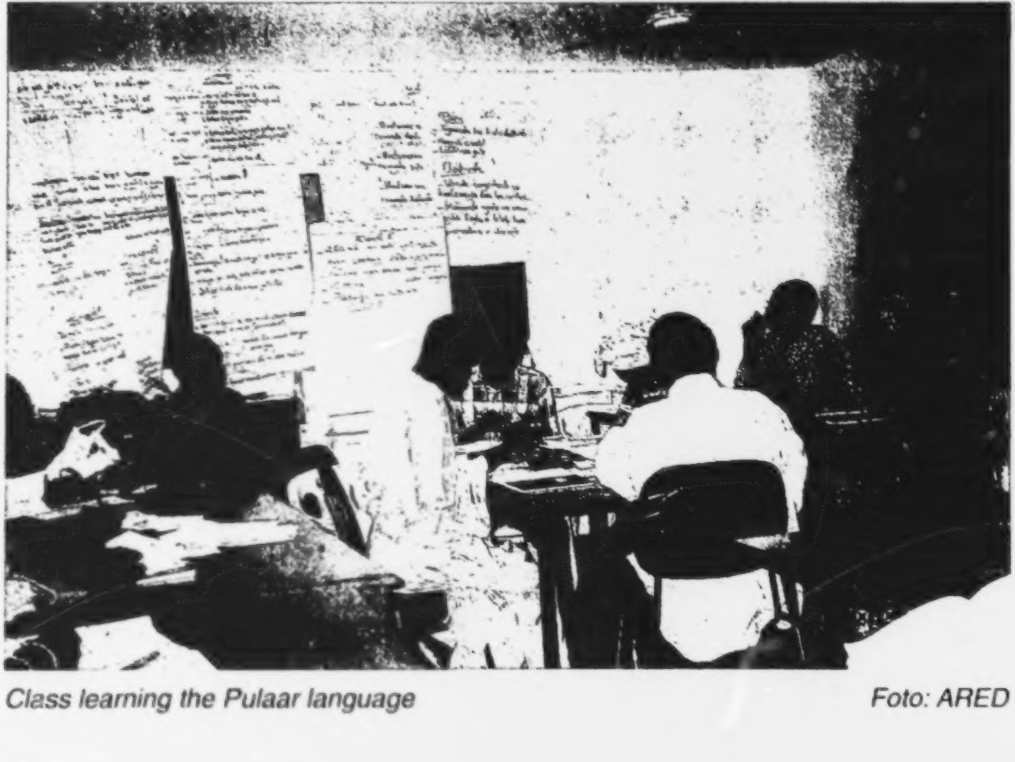
- lack of time
- inadequate materials for the number of participants
- lack of books beyond the basic syllabus
- minimally trained teachers
- lack of a coherent curriculum
- inexplicit teaching methodologies
- inadequate preparation for teaching adults

These factors are always present in some combination in every program. The miracle is that in spite of these odds against learning, most programs can nevertheless boast a surprising level of achievement.

Starting with Time

In the 1999 study by Wiegelmann and Naumann of educational systems in Senegal, they found low test results in the national language programs they studied, and wrote: *"The results of our testing of adults who have participated in a literacy class in national languages show the same tendency ... poor, even very poor, performance of new literates in reading, writing and math...".* However, they then go on to add a crucial piece of information–that this evaluation took place after only 150 hours of class time, and that *nevertheless* the results were *"...comparable to the level of knowledge in French [school] for students after three years of study"* (Wiegelmann and Naumann, 1999, p. 23).

For reasons of comparison, if we calculate the number of hours a student has been in school after three years of study at six hours per day over nine months per year, we come to roughly 3240 hours. We all know that no school year actually completes anywhere near this number of hours for a multitude of reasons. Nevertheless, curricula – and the accompanying achievement standards – are developed with a certain number of hours of study in mind, which in the formal school sector is counted in the thousands of hours. Many factors need to be taken into account before we can rightfully compare three years of study in French for children and one "year" of study in a maternal language for adults. However, one is forced to remark that the so-called "poor results" in the performance of the new literates in this study correlate with



Class learning the Pulaar language *Foto: ARED*

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a very short investment of time (150 hours compared with 3240) in the learning process.

In general, the average literacy program works on the assumption that no more than a total of 300 hours will be invested in classroom study (see PAPF, 1997). Most literacy classes are based on a program of two to three classes per week, each class lasting two to three hours, over a five to six month period in a given year. If we multiply these numbers, we come up with a program that could take between 80 (absolute minimum) and 216 (absolute maximum) hours in the first "year" of study. Most programs aim for 150 hours of study per year. Compare this with the concept of a six-hour school day for nine months out of the year, which gives a rough total of 1080 hours of class time.

Furthermore, most literacy programs are designed to continue for no more than two "years" (that is, between 160 and 432 hours) in total. In such a program, time for reflection, for integration of new knowledge, for repetition, for review, for application in real life situations, is extremely rare. The obvious conclusion we must draw is that we can't compare apples and oranges. One "year" of study in a literacy program has little resemblance to one "year" of study in school. The question then becomes how we can best utilize this time, which manages to produce results in spite of its short duration. The concept of standards must change if one wants to measure results achieved after just a few hundred hours of class time, with less than six months to assimilate and apply this new knowledge.

The Measure of Success

Since time spent in class is reduced to an absolute minimum in most literacy programs, we must of necessity change the concept of what we are looking for by the end of that time. In our opinion, this style of education should be designed to provide the key to subsequent learning, so that newly empowered individuals can go on learning in real life situations after the classes have ended.

In this educational context, programs should try to encourage as many people as possible to learn how to keep on learning. In our experience, methods of evaluation can be based on a simple three- to five-point scale:

1. the highest numbers mean that the person has a good mastery of the skill or information being evaluated,
2. the middle numbers mean that he or she has demonstrated an understanding of the underlying mechanism (i.e., for breaking words into syllables, for doing division, etc.), but still hesitates or makes mistakes in actual application,
3. and the lowest numbers mean that he or she is still having difficulty with the concept or the mechanism itself, and therefore needs more (class?) time.

Unlike evaluations inspired by the formal school system that are based on subtracting points for the number of errors, the objective in adult education should not be to test for accuracy, but to see if the person has arrived at a skill level sufficient to make him or her an "independent" learner after class has ended. Since adult education tends to be a short and intensive investment of time, it is not appropriate to demand full mastery by the end of the class. Rather, we should search for signs that demonstrate that participants are able to continue learning on their own after the class has ended.

For example, at the end of each ARED course, we ask the participants to write us a letter to give us feedback on the training. We do not use the criterion of "number of spelling errors" for grading them. We simply use the criterion of "Can we read and understand what they want to say?" Obviously, we hope that over time people will improve their spelling. But correct spelling seems like an inappropriate criterion at the end of only 100 hours of literacy class, where learners have had limited access to written text of any sort.

Can the Teachers Read?

It is important to keep in mind that a very large number of people acting as literacy teachers today are barely or newly literate themselves;

or at best, they have up to a high school level of French education, and perhaps one week of learning how to read in their own first language, as part of their training. In the case of Pulaar community classes, volunteers are often newly literate, being amongst the most enthusiastic to contribute to teaching others. We can think of several implications of this problem in recruiting qualified literacy teachers.

The first problem is that the vast majority of literacy teachers today have never owned a book in the language they are teaching in, beyond the initial primer. This includes those who have an education in French and who have had access to books in that language, but not in the national language. And in Pulaar, where so many teachers have never studied in French, this means that they have almost never seen or read a real text on any subject, in any quantity, of any quality, for any reason.

Secondly, if someone has first learned to read in Arabic or French, they read Pulaar with the same habit of breaking words into syllables in order to "sound out", rather than reading for meaning. And if their first experience with reading has been in Arabic or Pulaar, they do not necessarily know what a sentence is, what the role of capital letters is, or how to interpret punctuation marks which would normally help them understand – and read – the text. Arabic does not use these writing conventions, and they also aren't common in a primer which is based on words and short sentences in isolation, not meaningful text. The vast majority of new literacy teachers initially read without intonation, and ARED trainers generally provide the first example they've ever heard of a text read out loud in a meaningful fashion.

Training Teachers for Adults

We know by now that literacy programs operate with minimally trained teachers. Teachers are often recruited to salaried positions because they have the level of a high school student in French. They are then provided with roughly two weeks of intensive training on how to teach literacy classes for adult learners – as well as how to read and write in the language they will be teaching, if necessary. This is rarely enough time to change whatever ideas they have about teaching, which are based on their own personal experience as students in primary and secondary school, even though these experiences are totally aberrant for adult education. Although they all blossom under the participatory and learner-centered approach used in most training, many later fall back on the model of teaching with which they grew up.

In an evaluation we recently did, one of the first remarks that people made was to praise their literacy teachers – who, in this case, all happened to be newly literate members from the community itself. Amongst the most frequently cited attributes of the teachers were: 1) they were always on time, 2) they explained well enough and didn't hesitate to do it all over again if people didn't understand, 3) they often encouraged the participants, explaining to them why it is important to study, and 4) they never humiliated or embarrassed the participants. As one group said about their literacy teacher (who happened to be one of two women who had been trained alongside 96 men!):

> *We can't ask for more from a literacy teacher. She is always well-behaved and polite. She repeats every time we don't understand, but never makes us feel ridiculous. She never humiliates us. She comes to every class exactly on time, and stays after to work with individuals who are having problems.*

As trainers of teachers, we are in a continual battle against the mentality of the "Ceerno" (*master*). Even though almost all literacy teachers have the best of intentions, many can "turn off" their adult learners without being conscious of how important this vital respect is to them. In voluntary community classes, we often find that it is better to count on teachers who have never been to school. Even though their academic level may not be the highest, they don't have to unlearn as many inappropriate teaching techniques, and more rarely fall back on ridicule and humiliation in their manner of teaching.

Programs recruiting salaried literacy teachers inevitably choose the people with an education in French, whose handwriting is better and reading skills more fluent. But they might have made a trade-off in terms of behavior, availability, patience and enthusiasm.

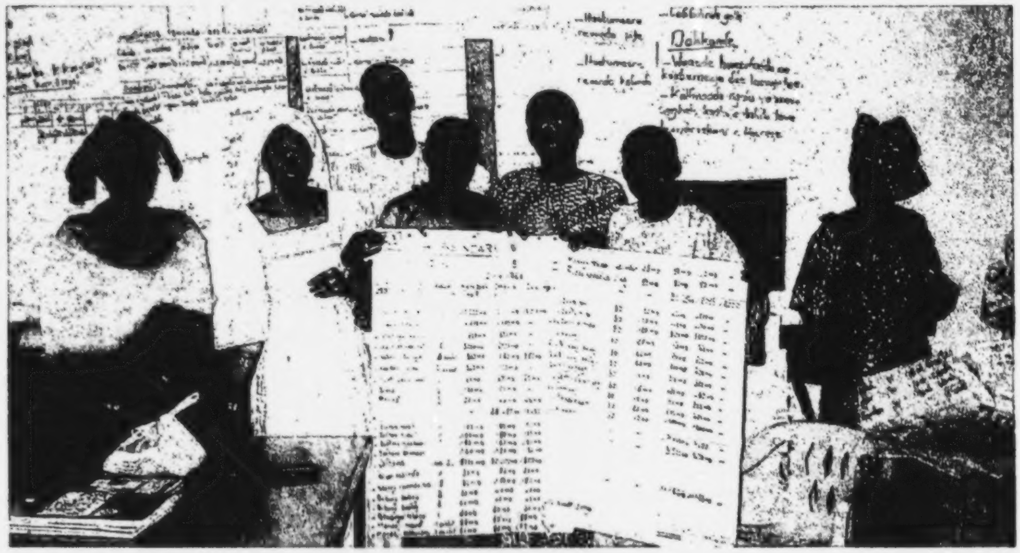
Literacy without Books

Most literacy programs operate without books. Radical as this statement may sound, it is a fact. "Without" might mean that there is an inadequate number of *copies* for the number of participants; or it may mean that there is an inadequate number of *titles* to draw from. In either case, we find that literacy classes today are fundamentally being taught as an *oral tradition*, not as part of a literate environment.

Beyond the straightforward quantitative deficiencies, there are also serious qualitative issues. Those few books which do exist tend to be of poor quality in both content and design, since there are very few national language editors to labor over texts in order to make them better, more readable, and more attractive, so that the design of the page supports the pedagogical approach of the book.

Nowhere do the inadequacies in teaching materials show up more clearly than in the teaching of math. Most programs seem to rely on the principle that if you can *do* the operation, you can *teach* it. Therefore math books become simply a series of exercises with blanks to fill in. There is no explicit instruction on how to teach the operation. The four basic operations (addition, subtraction, multiplication and division) are each presented in just one or two lessons, assuming that if a person can divide four by two, they have mastered the operation.

Materials rarely teach a level of performance beyond what most people can already do in their heads. The question is not whether people can add (or subtract or multiply or divide) four and two; but rather, can they cope with adding 856,724 to 1,499,285 – or subtracting or multiplying or dividing those numbers. Materials that teach people how to write down what they can already do are, indeed, a first step. But that is not enough, and the low results in math scores are, in our opinion, largely due to the fact that the materials are poor and teacher training does not address the issue of how to teach various operations in a clear, step-by-step fashion.



The group presents the results *Foto: ARED*

Conclusion

At the turn of the century, we are still just beginning to understand the rewards and values of adult education in African languages. At this time, there is a need to better understand the motivations of the participants and the limitations of our programs, so that we can provide better materials and teaching in future years when, hopefully, this force for democracy can fully play its role in society.

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In December 2000, the Department for International Development, United Kingdom, held a conference in Kathmandu together with education, health, social development and livelihoods advisers from Asia, and staff of the World Bank and UNAIDS. This was one of a number of conferences addressing the question of how literacy can and must help to combat poverty and improve standards of living in the age of globalization. Dr Julia Betts works for the Education Group, DFID India, in New Delhi.

Julia Betts

Literacies and Livelihoods: the DFID[1] Kathmandu Conference

In an increasingly globalised world, being able to access and use information, critically engage with issues and institutions relevant to one's life, and having the confidence and space in which to make one's voice heard, are valuable assets for anybody. Through its scope for enhancing these sorts of capabilities and practices, literacy has shown that it is a powerful aspect of the development response to poverty, vulnerability and isolation.

Yet while much literacy work takes place implicitly within different development 'sectors' – micro-finance, for example, or agricultural extension work – 'literacy provision' has largely been confined to the education sectors of funding agencies. And such literacy programmes have in the past been criticised for their limited impact through high dropout rates, low enrolment and completion rates and accordingly low rates of return.

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[1] Department for International Development

However, if adult literacy does have the capacity to enhance quality of life for those living in difficult circumstances across the globe, then clearly it forms a key part of the development agenda. With recent developments in literacy theory (the New Literacy studies, Street 1993, 2000), questions are increasingly being raised surrounding literacy policy and practice. How can provision really respond to the daily realities of the poor – to their needs and practices, hopes and aspirations? How can it avoid stigmatising those who have not had the opportunity to learn to read and write? How can literacy be made more relevant, accessible, equitable, extending to the very hardest to reach?

The DFID Kathmandu Conference

The recognition of the need to unravel these questions led to a cross-sectoral conference held in Kathmandu in December 2000. The meeting was attended by education, health, social development by DFID and Nepal and livelihoods advisors from across Asia, as well as representatives from bodies such as the World Bank and UNAIDS. In a rich cross-sectoral debate, the conference reflected on past experience (especially but not limited to DFID's experience in Asia) and explored some of the lessons learned. It aimed to address specific issues of conceptualisation, design, implementation and take-up, and to seek new and broader understandings for approaching and conceptualising literacy.

A major part of the argument in the Kathmandu conference about 'limited returns' from literacy initiatives held that programmes were too often 'decontextualised from people's lives'. In searching for ways to redress this, participants noted that many of the lessons learned from best practice in literacy programmes and projects cohere with the underlying principles of the **sustainable livelihoods** approach to development. The sustainable livelihoods approach views people as having access to certain assets, or poverty-reducing factors, which gain their meaning through the prevailing social, institutional and organisational environment. This environment also influences the livelihood strategies – the ways of combining and using assets – that are open to people as they pursue their own defined livelihood objectives. The six main principles of the sustainable livelihoods approach – people-centred, holistic, dynamic, building on strengths, sustainable, generating micro-macro links – are linked to a framework, which provides a conceptual tool for understanding the context in which people live.

This thinking has implications for literacy policy and practice locally, nationally and internationally. The Kathmandu conference noted some of the ways in which lessons from experience, linked to the sustainable livelihoods principles, could potentially benefit future literacy work:

- **Listening to the voices.** A wide body of evidence indicates that people's own defined literacy and communication needs and aspirations are closely bound up with their envisioned livelihood opportunities and strategies, whether these are market opportunities, access to information or 'voice'. Accordingly, the body of research and evaluations of literacy work in recent years have shown that literacy initiatives generally work far better when they form part of a holistic approach to development, rather than as stand-alone approaches. The reification of 'literacy' should be avoided if we are to escape the mistakes of the past. This is not to advocate 'literacy comes second' necessarily, but rather a view of literacy as a mechanism for helping people attain their own articulated aims and aspirations.
- **Building on strengths.** The number of people with no reading and writing skills at all is relatively low compared with the number who have made some gains either via schooling or their own private learning. The increasing body of ethnographic studies of literacy and communication practices has shown how those people classified by dominant voices as 'illiterate' in fact have their own complex social practices of literacy, and their own networks of support (Fingeret 1983; Barton and Hamilton 1998; Street 1993, 2000;). The main

starting-point for literacy work should therefore be what people already have, know and do, rather than the assumption that people are 'unknowing' blank slates.

- **Lives and context are dynamic.** People do not exist in static boxes; lives and livelihoods are complex, shifting and fluid. Accordingly, literacy and access to information needs are constantly changing. Literacy work therefore needs to be flexible and responsive within other livelihoods programmes, to reflect these varying needs and aspirations in an increasingly globalised world.
- **Responding to demand.** In aiming to maximise returns, the key lies in responding appropriately to what and how people want to learn. This may include such diverse elements as reading the Bible, signing payment cheques or gaining 'empowerment' or voice. There is thus a role for 'literacy first' work under the principle of 'demand-driven' development; however, experience has shown that if high attrition and low outcomes are to be avoided in these kinds of initiatives, then creative, flexible and often innovative responses are required.
- **Sustainability.** 'One-shot', one size fits all campaigns have largely failed to deliver. Long-term commitments are required – which means taking a more embedded, locally-owned view of programmes and projects.

Literacy therefore becomes not only an educational matter – a crucial factor in the worlds of funding agencies and their traditionally sectoral approaches to development – but rather a cross-cutting issue, which can enhance other development plans and programmes.

If synergies do exist between literacy research and sustainable livelihoods principles, what added value can be derived from taking an explicitly livelihoods view of literacy work? The answer may lie in reconceptualisation – by linking the experiences and findings of literacy research to the principles of the approach, funding agencies such as DFID can find an opportunity for cohesion and systematisation in their policy and practice. Thus literacy work can be grounded much more deeply in the perceptions and practices of the poor – their varied needs and understandings, their motivations and existing capabilities.

Tensions and Constraints

Yet the conference warned against concluding that all literacy work must draw neatly on these principles, or fit comfortably into the framework. The sustainable livelihoods principles should not be viewed as another 'dogma' for literacy. Rather, they may provide a useful resource for shaping our wider understandings and for contextualising literacy within the livelihood assets, strategies and context of the poor. Participants observed that the resonance of these principles with the New Literacies studies (Street 1993, 2000) lies partly in the fluidity of the approach – applied to different situations, a livelihoods analysis can reveal different realities and thus different ways of thinking about how literacy and communication are integral to people's lives. The approach is a tool to help shape thinking and to recognise complexity, including the roles of issues such as gender constraints and HIV / AIDS – rather than drawing a definitive map of where literacy always 'fits'.

Moreover, tensions inevitably exist within and between policymaking bodies and practitioners regarding the development of strategy and policy. Understandings of both 'literacy' and 'livelihoods' are often limited to narrow, technicist conceptions – the term 'livelihoods' for instance is often seen as a synonym for 'income-generation'. There are tensions between paradigms of 'literacy' linked to economic development – reinforced by the political impetus for funding agencies to produce demonstrable, quantified 'outcomes' in poverty reduction – and approaches that can recognise the diversity of people's livelihood and literacy needs and aspirations, and which have the capacity to be genuinely responsive to these. In illustration, the original title of the Kathmandu conference was 'literacy *for* livelihoods' – but after debate and discussion it was found necessary to change this to 'literacy *and* livelihoods', when consultation within and outside DFID revealed the danger of reverting to old-style 'functional' or 'work-orientated' views of literacy. The debate continues – does giving a title to a strategic approach run the risk of creating yet another ubiquitous 'brand' for literacy?

Different Approaches

The Kathmandu conference suggested that for funding agencies such as DFID, taking a more holistic, flexible and responsive approach to literacy work will imply greater communication and co-operation across development 'sectors', enhanced flexibility of design and approach, and innovative and more adaptable monitoring and evaluation procedures. It will require a greater emphasis on listening and questioning. It means avoiding central directives but rather building the rich and varied experience from within countries into policy work – learning from the ground up, making few assumptions, and standing willing to make a commitment to people's lives in the long term.

More information

www.livelihoods.org – for information on Sustainable Livelihoods approaches and practice. There is a report on the Kathmandu conference, including those papers given, and a discussion area on literacy, under the Literacy Post-It Board.

Kathmandu conference report – available from DFID education offices in Asia, or contact Julia Betts (j-betts@dfid.gov.uk)

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What is the case for a renewed engagement with adult basic education in developing countries? In particular, with regard to Africa, what is the value of such education? What are the main issues? What advice should be offered about how best to develop it? In addressing these questions, the present paper summarizes main points from a recent study (Lauglo 2001) which was conducted at the World Bank's Sub-Saharan Africa Regional Department and which is on the web at (www.worldbank.org/education/adultoutreach). The Study is part of a wider effort since 1997 which started with the "BELOISYA" project that enlisted the collaboration of African researchers in assessing internationally available evidence on a range of issues regarding Basic Education and Livelihood Opportunities for Illiterate and Semiliterate Young Adults (World Bank 2001). Jon Lauglo is a Senior Education Specialist at the World Bank, a Professor of Sociology at the Norwegian University of Science and Technology, and a Senior Researcher at NOVA-Norwegian Social Research. The following contribution will also appear in a collection of his works, edited by Klaus Schaack and Lim Se-Yung, which is being published in English in 2002 by Peter Lang Publishing Group (Frankfurt) under the title: "Education, Training, Contexts".

Jon Lauglo

A Case for Renewed Engagement with Adult Basic Education in Africa

UNESCO and UNICEF have long been supporting this field with some technical assistance and finance. For many years the German Adult Education Association has also been extending support to adult education in many countries through the work of its Institute for International Cooperation. But in major development financing agencies the interest is recently renewed. Thus, from 2001 the World Bank has been advising countries developing poverty reduction strategies to include adult basic education in their plans. See the Bank's "Source book for PRSP" (http://www.worldbank.org/poverty/strategies/chapters/education/educ0620.pdf). Other international funding agencies are during

2001-2002 looking into new ways to support the development of adult basic education. This is the case for DfID, Sida and NORAD. Norway's interest is also reflected in the role that the Norwegian Trust Fund for Education in Africa has taken in financing new initiatives from the World Bank in the last four years. Thus, there is a new momentum.

Actual growth is already occurring. Outside the Africa Region, the Bank has in the recent past supported adult literacy programs in Indonesia and Bangladesh. Within the Region it has for some years financed adult literacy programs in Ghana and Senegal. In 2001 implementation started also in Côte d'Ivoire. Adult education is now being made part of national education sector development programs in a number of other countries: Burkina Faso, Chad, Guinea, Mali, Mozambique, Niger, and Tanzania; or support will be given under community development or poverty reduction programs (Uganda). In some countries (the Gambia, Rwanda, Burundi) plans for World Bank finance are at an earlier stage. There are of course also countries with well-established programs which have been going on for some time with finance from other sources. South Africa, Namibia, Eritrea, Cape Verde are examples. The events demonstrate clear growth in this field.

Adult Basic Education – ABE

Adult Basic Education (ABE) will here refer to education which is aimed at adults who have had no schooling or very little schooling. "Adults" are reckoned to be persons above 14 years. Outside the scope of ABE as here defined, it is of course also important to develop educational provision which aims to reach children and adolescents who are below that age but who have been missed by primary schools. A major issue that is distinct for that population is how far one can develop better outreach and more inclusive practices in primary schools for "over-age" children as contrasted with separate "nonformal" provision.

The core elements of ABE will be literacy and practical arithmetic (numeracy), but ABE is also expected to include *other learning* than literacy and numeracy alone. What should these other elements be? Many learners would welcome vocational skills for livelihood improvement – a wish which it is very difficult to accommodate in large-scale programs that are established mainly to teach literacy and numeracy. Seemingly it is easier to add literacy teaching to programs which originally were set up to teach practical livelihood skills, than it is to add livelihood skills training to "literacy programs" (Oxenham *et al.*, forthcoming in 2002). Childcare, health, nutrition are often offered in ABE. In many countries today, there will be a particularly strong case for including the teaching of basic knowledge of HIV prevention and care for AIDS victims. But it would be wrong to assume that the so-called *functional skills* are the only ones that learners need or will want to learn. Religious expression can be very important when ABE is run by religious organizations. Artistic expression can also be cultivated as part of ABE. Nor should pure entertainment be ruled out.

It appears that no fixed formula is appropriate about what ABE should teach in addition to the core of literacy and numeracy. What illiterate and semiliterate adults already know well enough, what others think they "need", and what they want will vary considerably from place to place and with the type of group one is trying to reach. Consider, e.g., the range among such groups as cashew nut farmers, miners, micro-entrepreneurs, urban out-of-school youth, religious congregations, women's associations. Prescriptions across countries would be even less meaningful. Rather, the elements of "other learning" should depend on what the learners want and on what it is practically possible for a program to teach. Thus, it seems best to propose a flexible concept of ABE: *basic literacy, basic numeracy and context-dependent other learning*. [1] The term "basic" should be seen as carrying more meaning that simply a first or elementary stage. Basic should mean that which suffices to serve as a *basis*, a foundation upon which subsequent learning and use will build. This means that skills which atrophy and are lost have not reached the "basic" level – *only those which are retained and improved though later use.*

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[1] In introducing this term, the intention is not necessarily to urge governments and NGOs that provide what I call ABE to adopt it. When working in a country, development agencies should be prepared to use terms which are locally established, not insist on their own nomenclature. The main point of talking about ABE rather than 'adult literacy education' is the need to emphasize that other learning is also involved. ABE should be seen as a flexible term. ABE can be offered in quite formal evening schools – hence it need not be 'nonformal'. The 'other contents' need not be confined to that which has economic utility, hence it need not be 'functional literacy'.

The Case for ABE

Why should governments and aid agencies re-engage with adult basic education in Africa today?

ABE is needed for progress towards EFA. In many African countries the pace of primary school expansion, even if stepped up considerably, will fall far short of what is required in order to reach international targets for human development. Primary school expansion will not on its own suffice to reach the Education for All target of halving the rate of adult illiteracy by 2015. Besides, under EFA the demand for basic schooling from illiterate and semiliterate adults must also be taken seriously in its own right, now that the necessary role of adult education has been clearly recognized at the World Forum on Education for All in Dakar in 2000. Schools for children and basic education for adults are complementary services with potential for synergy, rather than merely being activities that compete for scarce resources. Adult learners become more supportive of their children's education. This finding is consistently documented in many countries.

ABE and community schools can mutually reinforce each other. In many governments and agencies there is support for making primary schools more community-based. Adult education not only generates support for adults for sending children to school, it can also give adults the skills and confidence to involve themselves more in local schools. It can also be developed as an outreach function of a community oriented school. Thus, ABE and primary education can mutually reinforce each other in school, but there is a need for applied research to draw lessons as to how this can best be achieved.

ABE serves the poor and improves gender equity. Adult Basic Education is important for an education strategy that seeks to be pro-poor and to redress social injustice. ABE is self-targeted upon the poor because it is sought by those with no schooling or very limited schooling.[2] ABE has a special role to play in alleviating gender inequity. ABE programs nearly always find it easier to attract females than males.[3] This is true even in those few developing countries where girls outnumber boys in school (e.g., Botswana). The gender gap is especially great in the very poorest countries with the most weakly developed school systems; and these are the countries which have the most urgent cause for developing ABE.

ABE empowers and can help build broadly based civil society. If education is to serve as a means of empowerment for the disadvantaged then it is essential that *adults* be reached with a type of education which helps turn "subjects" into "citizens" and which equips prospective leaders with appropriate skills and networks. A consistently reported positive impact of Adult Basic Education is that it builds a greater sense of self-efficacy, confidence to act on a wider range of social arenas than before, greater readiness to formulate and express one's own views. This empowerment function makes adult education especially important for the development of a broadly based civil society. The rise of such a civil society is generally held to be a precondition for a government that is held more accountable and responsive to the interests of the poor. *Thus ABE is a means to good governance in keeping with poverty-reduction goals.* Historically, adult education has been closely connected with the growth of broadly based democracy in many countries. One could expect that more participatory forms of pedagogy (at least a style of teaching which treats learners with respect) are likely to be more conducive to the development of individual and group efficacy. But it also seems that "empowerment gains" are a robust result from ABE projects using quite diverse pedagogies.

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[2] There is no guarantee that the very poorest and the most disadvantaged groups in a community will be the main beneficiaries of Adult Basic Education. Among the poor, self-selection will generally favor those with stronger personal and social resources. This is however not merely to be seen as a 'problem' because it is such persons who normally rise to leadership in work to improve the conditions of life of the poor.

[3] As of 1998, Chad appeared to be the one exception as far as national statistics are concerned. Another exception would be literacy projects based in modern sector workplaces (e.g., South Africa today) where male enrolment exceeds that of females probably simply because males predominate in this workforce.

ABE can improve family health. A large number of studies show that literate mothers are better able to protect their children's health. One such study by Sandiford *et al.* (1995) from Nicaragua found such effects after 10 years, making use of large samples and careful controls for other conditions affecting the results.

ABE removes barriers to entrepreneurship and can improve livelihoods. Oxenham *et al.* (forthcoming 2002) review research on ABE and improved livelihoods. Literacy and numeracy are widely perceived by ABE learners as a protection against being cheated and manipulated in the market place (see also Okech *et al.* 2001). Attempts to quantify the gains in life-time income which would be due to participation in Adult Basic Education are yet to be made, and there is recognition that other inputs also are needed (e.g., access to credit, vocational skills training) for tangible short-term income benefits to occur. But for micro-entrepreneurs it is also clear that lack of literacy and weak numeracy are major impediments to success.

Countering Misgivings

Misgivings about earlier adult literacy campaigns have led to much skepticism about Adult Basic Education. UNDP's 1976 evaluation of the Experimental World Literacy Programme showed disappointing results. The ratio of successful completers to initial enrolments in such a mass program was approximately 20% for Tanzania, 14% for Iran, 25% for Ethiopia, 23% for Ecuador, and 8% for Sudan (UNDP 1976:174) – very low "internal efficiency" indeed.

In the World Bank there was in fact strong interest in nonformal education in the late 1970s and early 1980s. This was followed by a review by Romain and Armstrong (1987) which left a widespread impression of weak performance in projects supported by the Bank. Adult literacy education was part of only some of the nonformal education projects covered in that review, and there was no analysis of the efficiency, learning outcomes or impact of such education. The review was really commenting on the difficulty of implementing nonformal education under conditions when preventable mistakes had been made. Implementation had suffered because nonformal education had typically been but a minor component in projects which mainly had other goals, and – crucially – the nonformal components had not been welcomed by the governments. Nonetheless, along with findings concerning UNESCO's Experimental Literacy Programme of earlier years, the review left a legacy of skepticism that also affected literacy education.

Is "efficiency" too poor? Past generalizations about poor internal efficiency of ABE (very low completion rates) are contradicted by more recent evidence. Programs have also changed. In recent years the trend in ABE provision has been to respond to active demand by local groups – unlike the early "mass campaigns" that sought to "eradicate illiteracy". Better efficiency should follow.

"Drop-out" may not be a very appropriate measure of efficiency in ABE because a "trial period" is to be expected among adult learners. A more appropriate measure may be whether a sufficiently large group stays with a course until completion, so as to ensure that there is a pedagogically viable group – without excessive unit costs. Nonetheless, in most recent programs for which there is information, at least half of those who enter, complete the course and meet whatever minimum performance criteria are used in each case. A recent review of 17 programs for which relevant data are available, found that in most programs at least 70 % of initial enrollees remained throughout the course period (Oxenham and Aoki forthcoming; for a summary, see http://www.worldbank.org/education/adultoutreach). The median rate of completion was 78 %. The proportion of initial enrollees who persist to completion and also pass minimum requirements will be lower. Among the 14 programs for which information on such rates was obtained, Oxenham and Aoki found a range from 5 to 89 percent. *But the median rate among these 14 programs was in fact a respectable 60 percent of initially enrolled learners*. Clearly, the "efficiency" of adult basic education courses is on the average much better than what some critics have alleged in the past. But there is also much variation among and within programs and therefore a need both to monitor implementation and to take remedial action when performance is weak. The findings do not point to any single prototype of superior teaching and learning methods. Several routes have seemingly worked well – as far as "internal efficiency" is concerned.

Is it too hard for adults to learn? One line of past criticism against Adult Basic Education is that adults acquire literacy skills more slowly and less well than do children of school age and that the skills are not well retained (Abadzi 1994). These claims are not supported by recent findings. In the case of Functional Adult Literacy programs in Uganda (Okech *et al.* 2001), "minimum literacy" was achieved in much less time (and at much less cost) than among children in primary schools. See (http://www1.worldbank.org/education/adultoutreach/Doc/uganda1.pdf). If adults nonetheless are handicapped, then other circumstances associated with ABE (self-selection, strong motivation) must outweigh any disadvantage, and it would be mistaken to consider such learning disadvantage to be a decisive barrier to literacy learning among adults.

Are costs too high? There is paucity of cost analysis for ABE (the Brazilian *Solidarity in Literacy Program* is one exception). However, high costs have never been an common argument against adult basic education, though tooling up of any new programs will have high start-up costs when a field has long lain fallow. Adult Basic Education is likely to have considerably lower operating costs (per person per year) than primary schools (let alone compared with other and costlier schooling) simply because ABE is much less teaching-intensive than schools. Adult courses typically meet only 4-6 hours each week, and ABE teachers are in any case often paid an allowance or "incentive" rather than a "proper wage" for their time.

Do adult learners lose the skills they have acquired? Such limited research as is available indicates that the loss of reading and basic arithmetic skills acquired from ABE is not the internationally pervasive problem it sometimes has been perceived to be. Findings from Uganda (Okech et al. 2001), Kenya (Carron et al. 1989), as well as studies reviewed by Comings (1995) suggest that the retention of reading skills and of skills in practical arithmetic is fairly robust, but that *writing* skills are more vulnerable. It is probably misplaced to invoke the risk of loss of reading skills as a reason for advocating access to libraries and support for "post-literacy courses". But even if skills are not "lost", there would be little point in teaching them if they find no use, and literacy is best conceived as a continuum where there is good cause to promote improvement beyond whatever level a learner reaches to begin with. This applies to school education for children as well as to adult education.

Are the learning outcomes too meager? If "literacy" is best conceived as a continuum, it is still useful to think of some basic level of mastery whose achievement will greatly ease further learning. Most "completers" of adult basic education courses achieve very limited literacy skills. It is likely that the same applies to most children completing primary schools in many developing countries. What would be a minimally "acceptable" level? A pragmatic criterion is that the level reached should be sufficient for later retention and improvement of skills – given the learners' life circumstances. Monitoring of *retention* would then become a means for assessing whether the initial learning has reached a minimally adequate *"basic"* level or not. However, the final goal of ABE – if it can be assessed – is not literacy but improvement in the conditions of life of the participants. Regardless of measured literacy gains, ABE can therefore be justified if empowering social skills and networks are acquired, if family health and livelihoods are improved, if life appears to be enriched by cultural expressions. Since such learning often is part of ABE, the associated learning activities may themselves be attractive to learners and worthy of assessment. Literacy outcomes may well be the most easily measured outcomes of ABE, but ABE should not be judged by literacy outcomes alone.

Are there "many literacies"? Among some academic adult educators there is much interest in distinctly different "literacies" for different uses. Should one abandon the idea of literacy as a unitary concept? Particular skills are of course required to operate a bank account, or to keep records of village council meetings, or to deal with authorities about land ownership. But the transferability of literacy and numeracy as general communication skills is a major reason why these skills are held to be important to begin with. Transferability was evident historically in countries which achieved early mass literacy. Literacy skills taught for religious instruction and self-instruction clearly found application in a wide range of secular pursuits – letter writing, reading newspapers, trade, nascent civil society organizations. Examples would be the Sunday Schools (for adults too) in early 19th century England, and the beginnings of schooling in Lutheran countries which long relied on Luther's Catechism as the primer. The evidence of transfer is strong enough to justify thinking about literacy as a single concept. However, there is also a *pedagogic* case for teaching reading and writing with close regard to that context of application which is of shared importance for the learners. The argument about what that context of application should be, runs close to arguments about what "other skills" should be taught. It should depend on what learners want and on their conditions of life.

Policy Issues

A government that is prepared to strengthen its support for ABE needs to consider a range of policy issues. As discussed in Lauglo (2001), these issues will often include:

- What groups to target?
- What are the roles for various organs of government and for NGOs?
- What the roles for businesses and industry?
- What language policy to adopt?
- How firmly should ABE be institutionalized? (e.g., the contrast between campaigns and permanent institutions, between volunteers and civil servants)
- Apart from literacy and numeracy, what should ABE teach?

- Should ABE give officially recognized equivalence to formal schooling?
- What role should information and communications technology play?
- How far can participatory pedagogy be implemented?
- How to build local social support for ABE?
- How to ensure adequate monitoring?
- How to finance ABE?

Recommendations

Decisions on how best to grapple with complex social problems will not be derived from research alone – nor *can* they be. But research still has an important role to play. Often its contribution will be to help define agendas for discussion. It can also challenge or add nuance to commonly held beliefs and give corrective feedback to implementation of projects and programs. Research on ABE has been helpful in identifying issues (e.g., in showing the great variation in how successful ABE is, and hence the need for monitoring), in challenging some of the more pessimistic generalizations which have been influential in the past, and in showing that no single approach is internationally superior in reaching good "internal efficiency".

"Recommendations" cannot escape personal judgment. The recommendations which are offered below have also benefited from much interpersonal consultation within the World Bank and with colleagues outside the Bank. Advice and critical feedback have widened the range of arguments and added nuance. Thus interpersonal "judgment" has played a part.

Judgments will reflect values as well as perceptions of how "the world works". Regarding ABE, there is among adult educators much agreement about the importance of *personal autonomy and active democratic citizenship as educational goals*. The value of personal autonomy and active citizenship translates into recommendations in favor of influence (or choice) for the learners, and for the groups and communities to which they belong, rather than strongly "statist" models. Within the World Bank, and in many other development agencies, there is declared support for making governance more accountable and more responsive to the interests of the poor. Strengthening civil society and making it more broadly based is seen as a means to this end. See, e.g., the World Bank's Comprehensive Development Framework, the thinking behind Poverty Reduction Strategy Papers, and the analysis in the publication "Can Africa Claim the 21st Century?". This view of civil society points to the importance of encouraging civil society to take a strong role as a provider of ABE.

In principle, the recommendations below must be both tentative and general – "tentative" because any perception of good practice should be provisional and open to revision in the light of experience, and "general" because they are intended as advice on the development of ABE across a very wide range of societies. Two of these recommendations, "responsiveness to learners" and "collaboration with civil society" are highlighted as especially important because they will echo the value concerns just mentioned, not merely arguments about efficient delivery.

Responsiveness to learners. The planning and implementation of ABE should strive to be responsive to the learners and their views. Such responsiveness need not always imply a strong local-community orientation of the ABE curriculum because the learners will sometimes see ABE mainly as a window to the larger world. The main point is that adult learners will walk away if ABE does not speak to their motives for participating, and strong motivation and social support are needed for adults to persist long enough to achieve "basic literacy" – however that be conceptualized. Adult learners are also entitled to respect and to some "voice" simply because they are mature persons in adult roles.

Collaboration with civil society. Governments should collaborate with civil society organizations in the provision of ABE and look for ways of benefiting from the experience of such organizations because:

- Civil society organizations are active providers of ABE and a source of innovation

- Collaboration helps maximize the total supply of ABE in a country
- Community-based organizations can give much needed local social support for ABE (churches, mosques, farmers' organizations, women's organizations)
- Support for ABE in civil society organizations is also a means to strengthen such organizations and their community base

"Civil society" is of course a liberal concept that presupposes a certain mutual respect and tolerance among its constituent associations and organizations. It presupposes that legitimacy has been achieved for pluralism. In sharply polarized societies trust and acceptance of pluralism will be weak. But it is important to exploit such opportunities for collaborative relations as exist. ABE policies should do so.

Other recommendations for governments

- Recognize the importance of ABE for achieving Education for All
- Give strong political leadership to ABE, find good staff for key government positions, be prepared for considerable investment in institutional development
- Regardless of what form of collaboration is established with civil society (e.g., considerable outsourcing) a specialized government unit for Adult Education is needed, and in countries with high adult illiteracy its focus should be on Adult **Basic** Education
- Give strong political leadership to ABE, find good staff for key positions
- Be prepared for considerable investment in institutional development
- Consider other forms of administration than the normal government departments (e.g., foundations, funds over which stakeholders can be given some influence too)
- Target especially women and out-of-school adolescents
- Look for opportunities to initiate ABE in already established groups.
- Build partnerships with enterprises too, not only "civil society organizations"
- Use local languages for initial literacy teaching, and provide a route to the official language for those who have acquired literacy

- Recruit teachers locally and use fixed-term contracts
- Respond to what learners want and adapt ABE curricula and materials to the local context
- Include prevention of HIV and caring for AIDS victims in the ABE curriculum
- Back ABE up with radio; more advanced Information and Communications Technology (ICT) has a role to play in enriching the training of managers and instructors/facilitators
- Use methods that show respect for the learners, and seek to make them active participants
- Create opportunities for continuing education
- Monitor ABE carefully but look for ways that are participatory and helpful to providers
- Ensure that no one wishing to attend ABE is unable to do so because of inability to pay

"Fixed-term contracts" for literacy teachers could be interpreted as part of the "contract teaching" phenomenon which is opposed by many educators committed to improved professionalism in education. A comment is therefore needed. In those predominantly rural African countries where the need for ABE is especially great (high adult illiteracy, low school enrollment rates, low urbanization), there are a number of practical constraints which make employment on civil service terms unrealistic. Usually, in rural settings ABE teaching is only a part-time job for a couple of teaching sessions each week. Even if most adults are illiterate or semiliterate, the long-term effective *demand* for ABE will be uncertain in a small village. In most cases, those who are locally available for ABE teaching will have no formal teaching qualification and at most a secondary school background. Organizing a supply of teachers with long training in ABE teaching is not a workable medium-term solution in such circumstances. Is it a worthy long-term goal? There are other arguments for fixed-term contracts than lack of workable alternatives. If one wants to make ABE accountable to the participants, to the local community and to civil society organizations sponsoring or providing ABE, "civil service" terms of employment for teachers would hardly be expedient. Contract renewal should be based on demonstrated good performance and on good indication of continued local demand for ABE.

Recommendations for development agencies. Development agencies should actively advocate ABE programs. They should help countries prepare and finance such programs as well as mobilize financial support from others and develop their own capacity regarding ABE, and they should work actively to improve and share the knowledge base regarding promising initiatives and practices in ABE.

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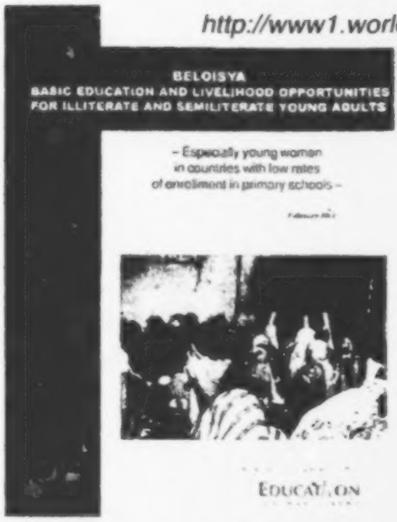

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– Especially young women
in countries with low rates
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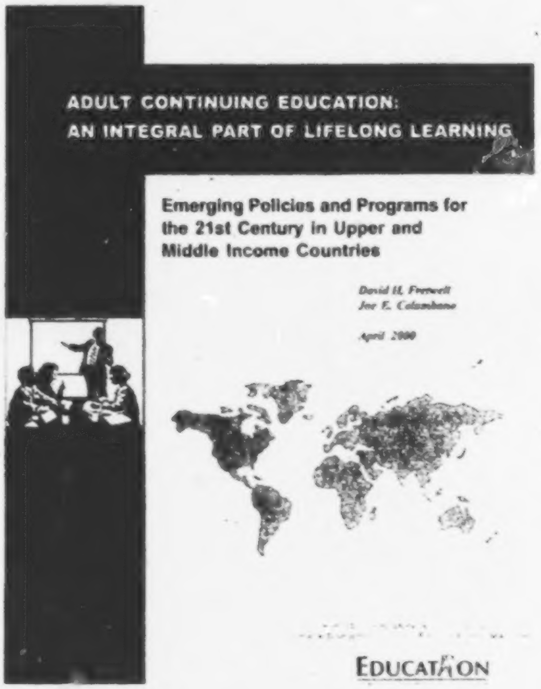

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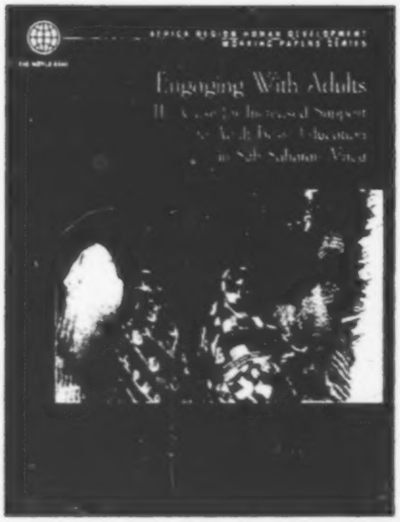

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AIDS, hunger, poverty, illiteracy, a ruined environment, war and oppression of women. What have we adult educators achieved? Have we done enough? What more should we have done? Usa Duongsaa, President of the Asian South Pacific Bureau of Adult Education (ASPBAE), poses some critical questions.

Usa Duongsaa

Questions for Adult Educators

This year we mark 20 years of HIV/AIDS,
Facing the stark fact that 22 million people already lost their lives to AIDS-related illnesses,
That 36 million more are living with HIV/AIDS, and
15,000 people become 'new cases' every day,
While hundreds of millions are still not even aware that they too are vulnerable,
And while hundreds of thousands of
  adult educators and development workers still do not realize that
  this pandemic is undermining the development progress
  we have spent decades working to achieve
  in many countries.

What does this fact tell us?
What have these years taught us?
What have we learned
  about adult education,
  about our roles, our successes and failures, as adult educators?

After working for many years,
Reading many books,
Writing many papers and articles,
Giving many lectures and presentations,
Attending many meetings, workshops, and conferences,
Drafting many declarations,
What have we achieved?
How much difference have we really made?

This year millions of people still have no access to education.
This year millions of people still have no access to skills training.
This year millions of people still have no access to proper shelter.
This year millions of people still have no access to nutritious food and clean water.
This year millions of people still have no access to healthcare, disease prevention, and treatment.
This year millions of people still have no access to farming land.
This year millions of people still have no access to decent work with decent pay.
This year millions of people still have no access to peace and security.
This year millions of people still have no access to human rights, dignity, and self-fulfillment.

How did we allow all this to happen?
What have we done?
What have we NOT done to stop all this from continuing?
What MORE could we have done?

This year millions of people still live in poverty.

This year hundreds of thousands of children are still abused and exploited as child workers, child soldiers, and child prostitutes by adults.

This year millions of women remain victims of violence, exploitation, and discrimination.

This year millions of workers still suffer occupational health hazards for which compensation is not very likely.

This year the voices of many indigenous people are still unheard, and thousands of indigenous languages are becoming extinct.

This year tons of drugs are produced and millions of people are addicted.

This year countless families are broken and communities are weakened.

This year millions of people are still displaced, either by war, in the name of development, or in search of a steadier income.

This year millions of people are still stigmatized and discriminated against because of their race, sex, religious belief, political orientation, sexual preference, or health status.

This year a huge amount of money is still spent on procurement of arms, instead of purchase of medicines for the sick, occupational skills development for the differently able, or provision of credit and welfare for the poor.

This year many forests are still being cut down, and the earth, the air and the rivers are being polluted.

How did we allow all this to continue?
What have we done?
What have we NOT done to stop all this from happening?
What MORE could we have done?

Could we have made more efforts to promote education for all?

Could we have made more efforts to advance the empowerment of women and promote gender sensitivity and equality?

Could we have made more efforts to provide relevant education for workers, migrants, refugees, the differently able, indigenous people?

Could we have made more efforts to provide vocational education for those in their productive years?

Could we have made more efforts to provide HIV/AIDS education to all those who might be at risk?

Could we have made more efforts to provide health education for all?

Could we have made more efforts to provide drugs education and life skills training to the vulnerable?

Could we have made more efforts to provide environmental education for both urban and rural populations?

Could we have made more efforts to advocate peace education in all societies?

Could we have made more efforts to provide citizenship and human rights education in all communities, societies, and countries?

Would we not have made more difference if we had done so?

What could we have done?

Could we have worked differently?

Could we have made more alliances, collaborating more closely at local, national, regional, and global levels?

Could we have more effectively utilized communications and information technologies as tools to promote more learning and more sharing?

Could we have advocated more with the 'big people' like policy makers, decision makers, and donors to develop more enabling policies and environments?

Could we have worked more closely with the 'little people' who are vulnerable and marginalized, listening to them, supporting them, linking them with others, enabling them to learn from each other, empowering them so they can advocate their own agenda?

Would we not have made more difference if we had done so?

What can we do now?

Can we humbly learn from the experiences and the lessons of
Many people living with HIV/AIDS who, like the phoenix rising from its ashes,
Have braved the pain, the fright, the guilt, the stigma, the despair
And the trap of the individual
To reach out to others, to form groups and networks and coalitions,
to demand equal access to treatment, care and support,
to confirm their rights to dignity and respect,
to reclaim their place in society,
and to reaffirm their worth and contribution to society as educators and catalysts for change?
Their relative successes and their ongoing struggles remind us
just how much they have done all by themselves,
how much more needs to be done,
how much technical support is still needed,
and just how little we have done so far to advance their cause,
as adult educators.

This year, as we celebrate another year of adult education and adult learning,
As we look around at our communities, our societies, and the world,
We should ask ourselves seriously, and honestly…

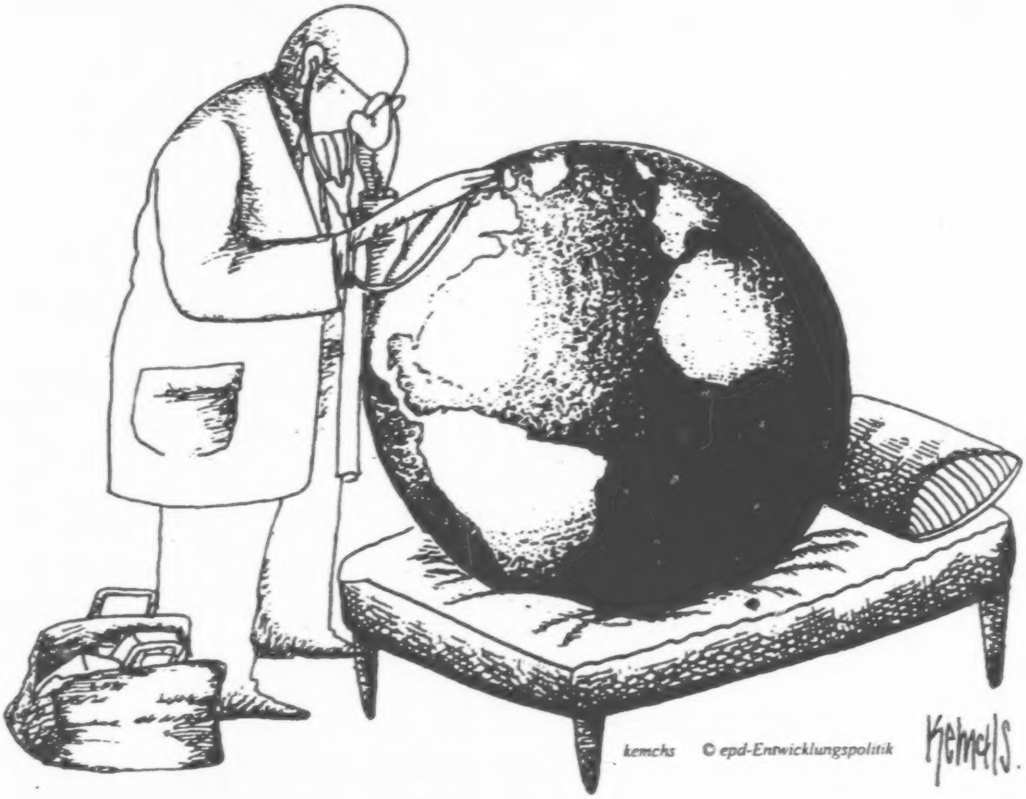
Have we succeeded as adult educators?
What can we be proud of as our achievements and our contributions?
Have we done enough?
Have we made a real difference?
Can we do more NOW?
What can we do?

Let us try harder.
Let us break down barriers that have enclosed us in the tower of adult education.
Let us build bridges that will connect us with the world,
with the communities.

Let us be educated about the needs and the problems of the people
and be guided by their questions, wisdom, and potentials.
Let us rethink our goals and our priorities.
Let us re-work our strategies.
Let us renew our commitment.
Let us rebuild our networks and our alliances
to rebuild the world
together.

Before it becomes too late,
Before it becomes useless to even ask:
what have we NOT done?
what MORE could we have done?

What if we had done more?



Source: epd Entwicklungspolitik 4/2002, p. 40

Uganda, once the country with the highest AIDS rate in Africa, has been waging a successful campaign against this insidious disease. Sabine Ludwig reports. The text is reprinted from the journal "Kommunikation Global", Volume II, No. 22, p. 33. The author is a freelance journalist.

Sabine Ludwig

Uganda's Exemplary Fight against AIDS

Uganda has been successfully combating AIDS since 1987. The number of people infected has fallen from 35 per cent at the outset to around 6.5 per cent. This rapid decline merits respect, and not only on the African continent. The country which once had the highest rate of AIDS in the whole of Africa has demonstrated what it can achieve. It has become an exemplary model for the rest of Black Africa.

According to Joseph Otim, who has been an adviser to President Yoweri Museveni since 1994, AIDS is regarded by the Government as a serious and dangerous disease. Not only does AIDS kill many members of families and of the labour force, orphan innumerable children and undermine the country's economy and productivity, but it is also a threat to an adequate food supply.

Portrait:

John Joseph Otim, aged 60, married, 7 children

Master's degree in agriculture and animal husbandry

Ph.D . in food science and animal husbandry

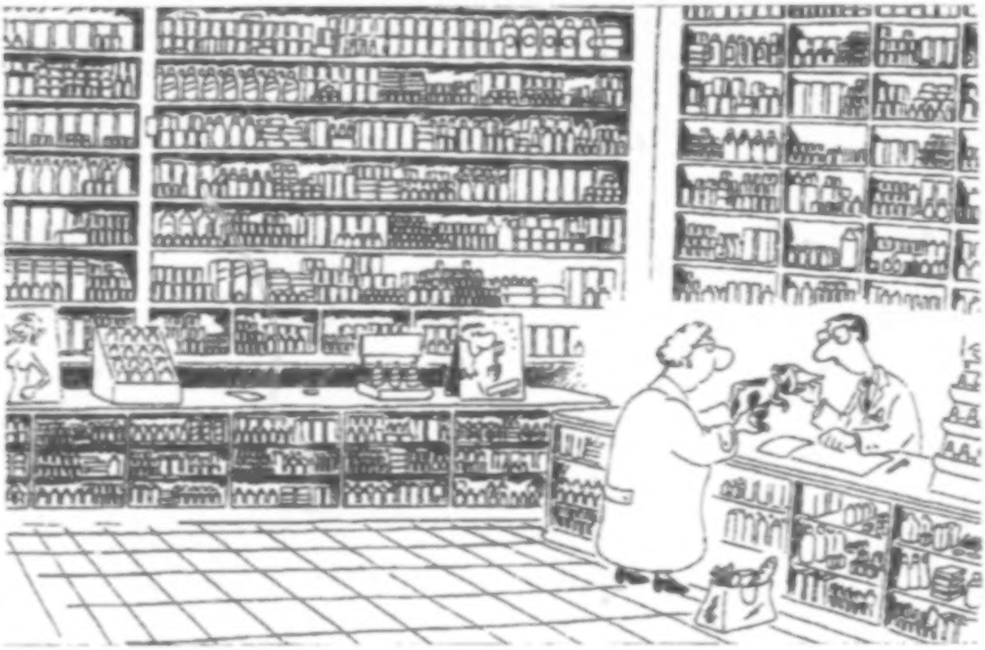
Professor at Makerere University in Kampala, Uganda and at the University of Nairobi, Kenya

Member of Parliament

Minister of Animal Husbandry and Fishery: 1980-1985

Presidential adviser since 1994

The Government has therefore decided on an aggressive well-publicised policy. An AIDS Commission has been set up within the Ministry of Health to maintain a national network. All campaigns, awareness activities and information about the fatal disease are checked thoroughly by this Commission. It is only then that they are made public via the media such as radio, television and newspapers, and via community and religious leaders.



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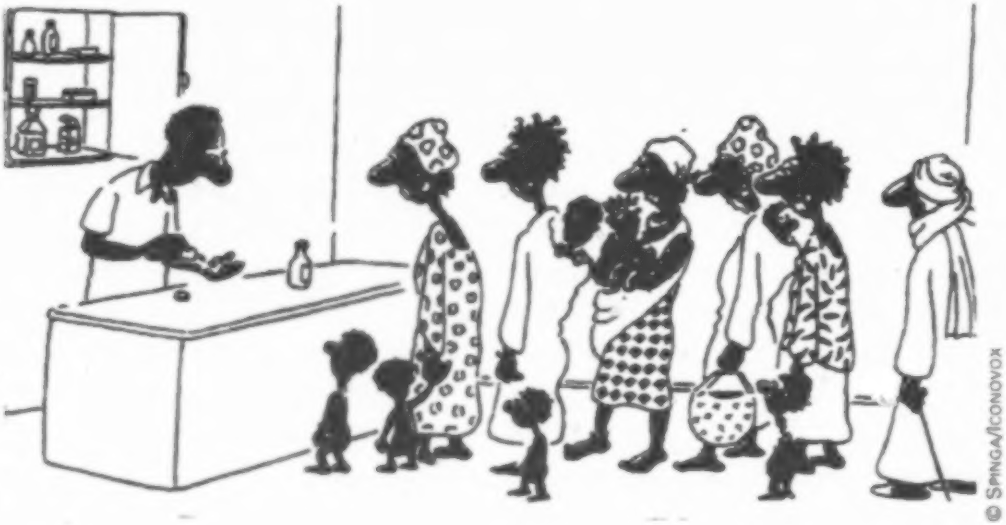
In the North ...



... in the South

Source: UNESCO Sources November 2000 – No. 128, pp. 6/7

On television, there is a quiz with music videos. The young host asks questions about the issue, which viewers can answer by telephone. The prizes for winners are not radio sets or CDs, but condoms, major prizes being ten packets at once. Theatre companies tour the country constantly bringing home the message about AIDS. They perform on stages set up on the backs of lorries and demonstrate the correct use of condoms using wooden penises. Sometimes the audience is abashed, and sometimes amused. But something always remains of the message that the disease is a killer and that infection can be prevented with the requisite knowledge.

Leading politicians provide crucial support. President Museveni has spoken out in public about sex and AIDS in recent years as often as any head of state. Otim also points out how important it is for sufferers to receive treatment and care. The taboo about AIDS must be broken. The aim is to persuade the population to accept sufferers and to give them the will to live. This is the only way in the long term of dealing with this deadly disease. Assistance and advice from medical specialists are extremely important, since they can explain clearly how the disease is transmitted and can show that AIDS is not infectious if handled correctly.

There is still the problem of the cost of medication. Otim places considerable hope in a fund being set up by the European Union and the United States to make grants available so that AIDS medicines come within the reach of the Third World. The campaign, which has now lasted almost 15 years, is funded out of the national budget from tax revenues and from support by international donors. *"We still urgently need additional financial help",* Otim adds. But what were the causes of the rapid and terrible rise in AIDS in Uganda? *"It was not until after the war of liberation against the terror regime of Idi Amin that isolated cases came to light,"* Otim states. Irregular Ugandan troops trained in Tanzania, together with Tanzanian forces, eventually succeeded in overthrowing the dictator in 1979. And it was among these soldiers that the AIDS virus subsequently first appeared. *"But it is still not clear where and how these people were infected."*

Even after the successes of recent years Uganda cannot relax, however. The politicians continually stress that *"we must go on",* in the hope that Uganda will remain the exemplary model.

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11th GERMAN ADULT EDUCATION CONFERENCE

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Final Meeting

In the last issue we announced the 11th German Adult Education Conference. This was held in November 2001 and attracted over 1000 visitors and considerable international participation.

The President of the Federal Republic of Germany, Johannes Rau, opened the event. We include his speech on the role of continuing education in a knowledge-based society, together with the address given at the conference by Ms Viviane Reding, EU Commissioner for Education and Culture, on Lifelong Learning in Europe and the role of adult education centres.

Is the gap between rich and poor widening? Or can globalization be controlled so that all benefit? Prof. Dr. Franz Nuscheler critically examines this issue in his paper "Globalization – Is the South Losing Touch?" The author is Professor and Head of the Institute for Development and Peace at the University of Duisburg, a member of the Scientific Advisory Committee to the Federal Government on "Global Environmental Change" (WGBU), and a member of the Commission of Inquiry on "Globalization of the Economy".

The paper by Marcie Boucouvalas and John A. Henschke, which they prepared for the German Adult Education Conference, looks at the meaning of globalization for international cooperation and new partnerships from an American standpoint in the light of the terrible events of 11 September 2001. Marcie Boucouvalas is Professor of Adult Education and Human Resource Development (HRD) at Virginia Polytechnic and State University, and John A. Henschke is Associate Professor of Education at the Division of Educational Leadership and Policy Studies, College of Education at the University of Missouri-St. Louis, USA.

At the end, Prof. (H) Dr. Heribert Hinzen, Director of the IIZ/DVV, gives his impressions of this major event, and raises some critical questions.

Johannes Rau

Inaugural Address of the 11th German Adult Education Conference

I.

For some time no contribution to the debate about education has been complete without mention of the term "the knowledge society". I admit that I have some problems with this. Either the term is meaningless – the Neanderthalers already had knowledge when they were banging about with stone axes – or it is misleading. All the same, there seems to me to be a widespread belief that knowledge is some kind of super petrol which you only need to put in the car to make the engine turn faster. That is obviously untrue, since knowledge without judgment is like petrol without lubricating oil. Anyone who has a lot of it may be able to drive, but won't be going anywhere. The engine inside his or her head will give up the ghost at the next bend. In the literal sense of the word.

But it is true that we live in a civilization which relies on scientific and technical knowledge. Anyone wanting to cope in this world must be able and willing to learn, and must be able and willing to make judgments throughout life.

Are we equipped to do so? Germany remains one of the most scientifically advanced countries. The OECD has just certified that we have an above-average level of education. This is not an occasion for self-congratulation, however. Education must once more be given considerably higher priority, and we must focus specifically on those points where something must really be done. There is no need to be alarmist, however, merely to "keep gnawing at the problem" as the saying goes.

The specific shortcomings of the German education system did not come about yesterday. Nor did they come about twenty or thirty years ago, as they often go back a long way in the history of German education. They are therefore pretty tough shortcomings, thick and knotty and made of hardwood. They are not known for their flexibility.

Shortcomings like that need a good set of incisors and stamina if we are not to run out of breath. One of these shortcomings is the low priority given to the transfer of knowledge in our education system. That is what I intend to speak about today.

II.

Talk about the knowledge society generally refers to the universities, and not infrequently to the production of knowledge. There can be no question that lively and innovative research in the natural and liberal sciences is at the heart of any modern education system, and must be kept in good order in future. But an organism can only function if not only the heart is in good order, but also the blood vessels. The same is true of education. If the knowledge which is produced in research does not reach the places for which it is intended, the organism will fall ill at a certain point. If the interchange between the circulating knowledge and the latticework of social life is not working, the circulatory system will break down and sooner or later the heart will stop beating.

The arteries through which education and training flow in our society has many ramifications. A key role is played both by higher education institutions, schools and Volkshochschulen (adult education centres), and by business, which makes its contribution through the Dual System. But it is obvious throughout that we are not giving the attention to the transfer of knowledge that it deserves. We nurse the heart but let the arteries become clogged. Let me illustrate the situation with a few shining examples:

- In universities, teaching has always played second fiddle to research. This continues to be evident in the extremely high figures for student drop-out.
- We concentrate on the universities and do not do nearly enough for technical higher education in the Fachhochschulen. This is appar-

ent in their slow rate of growth and the continuing limited range of subjects on offer in the Fachhochschulen.

- We devote more resources to higher education than to school education and allow teaching staffs and equipment in schools to become older and older.
- We focus our efforts on the final years of secondary education and neglect kindergartens, and pre-school and primary education.
- And finally, despite the lip-service paid to the need for lifelong learning, the emphasis is still on encouraging schools and higher education.

Instead of bite-sized learning offered bit by bit in response to individual needs, circumstances and inclinations, knowledge is generally provided in the form of a ten-course set menu in the various stages of our education system. Continuing education institutions may be praised to the skies, but they are the Cinderella of the education system, seldom properly fed and clothed.

The basic pattern is the same everywhere. Those areas and stages of the education system where knowledge transfer does not generally happen automatically are neglected. Savings are made where teaching and teachers need particular attention and special resources. If one thing is true in the debate about the knowledge society, then it is surely that more and more people will in future need and want to have a share in knowledge. This will not replace the production of new knowledge, certainly. But it would also be totally wrong to play off research against education and to preach about how wonderful research is in run-down classrooms.

The transfer of knowledge must at last be given the priority which it deserves. Improving the transfer of knowledge includes giving due weight to continuing education and those bodies which sponsor it. The frequently derided and seldom read Weimar Constitution states that: *"Public education, including the Volkshochschulen (adult education centres), shall be supported by the Reich (central government), the Länder and the local communities."* This lays down a principle that is more relevant than ever today. Particularly in an aging society, continuing education is not a luxury but an urgent requirement.

III.

For the future development of continuing education I feel it is important that we should avoid one mistake from which our education system has been suffering up to now. Despite all our efforts to change, we still think too much in terms of a traditional system of entitlement to education that is defined and monitored by the State. As a result, our education system is far too rigid in many respects. People who for whatever reason cannot or will not follow the established paths of educational progression face problems in Germany. It is still far too difficult to move from one educational track to another, and the links between them are too few.

The strict divisions between educational institutions are a general problem. They are particularly harmful in continuing education. In the final analysis, it is vital to continuing education that everyone should have access to it at all times, and should be able to swap from one sort of provision to another and to join and leave at any moment, depending on what suits each person best. It is vital to continuing education that all social needs and interests should be catered for and that widely varying requirements and demands should be taken into account.

This high degree of flexibility can only be achieved if all who can contribute to continuing education work together and build networks that are both flexible and strong. But such networks need firm foundations. They need pillars to rest on, so that they are stable and reliable. We have these pillars. They are the thousand Volkshochschulen in our country, more than in any other country in Europe.

Many people will ask: what can you learn there? And the mockers who always have a ready answer will say “Crochet for left-handers”. You are all familiar with this distorted image of the Volkshochschulen. It is a prejudice, unfair and untrue. Precisely because we live in a society in which lifelong learning is so important, I am particularly anxious that we should fiercely combat this false image that floats around in many people's heads.

The Volkshochschulen provide a range of services which focus on topics of particular relevance in our present situation. Language courses, electronic data processing and human health are on offer almost everywhere. Professional courses are provided for business. In many Länder, for example, inservice training for teachers is also provided on behalf of the Land authorities. This means that the Volkshochschulen need to perform a difficult balancing act. On the one hand they are educational institutions which are intended to provide all groups of the population with access to knowledge, and on the other, they are expected to compete successfully with the specialized provision of commercial institutes which target a small clientele that is well able to pay.

I am not saying that the Volkshochschulen should aim to turn into a sort of milch cow that will also give wool and lay eggs for everyone. But I am saying that their difficult task of being education centres for all is also their greatest opportunity.

The Volkshochschulen must, of course, make provision for those who lack privileged access to knowledge. But it is unfair that this educational task of the Volkshochschulen should have led to their being dismissed as educational institutes for the poor – leaving aside the fact that I cannot see what is contemptible in that.

But alongside the provision for so-called average consumers, the programmes of the Volkshochschulen are also targeted at a quite different clientele. Quite right, I believe. I refer to their provision for specialists and professionals which can compete with that of the commercial institutes. I know that this branch of Volkshochschule activities is sometimes criticized. But I should like to ask why a Volkshochschule which is worthy of the name should not be able to offer something for all of the people.

The broad range of educational provision of the Volkshochschulen helps to prevent the knowledge society from becoming a divided society. The figures speak for themselves. In North Rhine-Westphalia alone, a Land which I know relatively well, nearly two million people – more than ten per cent of citizens – took part in 1999 in one of over 90,000 courses offered by the Volkshochschulen. In the whole of Germany, the Volkshochschulen provided fifteen million 45-minute units of tuition last year, in over 500,000 courses.

IV.

Institutions which are as quick on their feet and react as rapidly as the Volkshochschulen need money. Many people think that citizens should pay for their own continuing education since it necessarily serves the interests of the individual rather than those of society in general.

Many of the bodies sponsoring Volkshochschulen also expect their provision to relieve the pressure on the public purse. This is wrong. Of course there is a demand from individuals for the sort of continuing education provided by the Volkshochschulen and others. It is also true that a material contribution can be demanded from people who are pursuing personal needs, interests or inclinations. While everyone may be entitled to learn to swim while at school, there is no automatic right to the requisite free bathing costume of one's choice after leaving school.

All this does not mean, however, that the Länder and the local communities – not to mention enterprises – do not derive huge benefits from properly functioning continuing education, and from the Volkshochschulen in particular. They must surely also have a stake in their operating better in future than they do at present.

In our society, continuing education must not become a luxury affordable only for the few. This would directly affect those who need continuing education the most. Continuing education must be affordable for all. For that reason, the Volkshochschulen are the key focal points in the continuing education networks. Not only do they offer provision of high quality, but it is also affordable. But they cannot do this if the State withdraws support.

On average, 40 per cent of the annual budget of the German Volkshochschulen, 1.8 billion marks, is already contributed by students through fees. I find that a lot.

In many Länder, this percentage is appreciably higher, sometimes over 50 per cent. It must and shall not increase further, even though savings have to be made in public funds. The Volkshochschulen and their educational activities must be worth something to us in money terms – indeed more than they now receive.

V.

But money is not everything. It is also vital that teachers and students of Volkshochschulen should be enthusiastic, not merely working through a prescribed programme but making a commitment from the heart. We have plenty of reasons to be grateful to the teachers – for ensuring at their places of work that the circulation of knowledge keeps flowing, for putting their whole heart into the transfer of knowledge, for being able also to listen, for making room for people's own suggestions, and for turning new ideas into interesting course provision. Our Volkshochschulen could not be conceived of without this human commitment. It is my plea and my hope that they do not cease in their efforts to make education available to all. Everywhere, throughout life and on a human scale.

Viviane Reding

Lifelong Learning in Europe

This 11th Conference of German adult education centres takes place in a historic year for education policy. Never before was there a year in which Europe has thought about and discussed the future of lifelong learning so much.

The year 2001 is the **European Year of Language Learning** and its programme with its many language learning workshops, its multilingualism and its internationality reflects the continual contribution in this field.

At the same time this year marks the start of the **5th European Framework for the Advancement of Equal Opportunities for Men and Women,** which will run from 2001 until 2006. I myself am a member of the group of 5 commissioners in the committee, which – under Mr Prody's presidency – coordinates equal opportunities for men and women. In this programme lifelong learning is seen as one of the most important instruments in achieving equal opportunities.

Three quarters of students in adult education centres in Germany are women of every age. This is really significant. An OECD survey only recently showed that it is still mostly men, especially men between the ages of 25 – 50, who enjoy the best opportunities for further education. Men's chances even increase with their educational and financial status. With this in mind **you provide an extremely valuable contribution to gender mainstreaming in Europe.** Please let me encourage you to spread your services in this field more so that other sectors of lifelong learning can profit. In the adult education centres experts in adult education have developed important women related programmes in all fields of learning, they have encouraged women to engage in politics, to prepare themselves for a job, to defend their jobs and to keep their jobs. Some of the most interesting programmes, among them programmes which we gladly supported with funds from the Socrates programme, will be presented here in workshops.

This year the **Memorandum on Lifelong Learning,** which the European Commission presented to the public in November 2000, has generated many discussions throughout Europe. The Commission invited all Member States and canditate states to discuss the Memorandum and to submit suggestions for an action plan concerning lifelong learning. In addition non-government organizations and individual citizens were invited to join the debate. A tentative estimate states that 12 000 people in the whole of Europe participated in the discussion on the Memorandum. Many also took an active role in the debate by contributing their experiences and visions. I would like to thank you all very much.

The Member States have informed us of the wide range of suggestions and actions regarding lifelong learning. The multitude and quality of the events that took place everywhere have shown us that the European consultancy process is itself an important catalyst for an increased awareness and new politico-educational momentum. The Commission will soon present the many interesting recommendations, which were made from all sides, to the Council for Education and the Council for Youth to realize a **European platform for lifelong learning.**

Together with the European Ministries for Education we will try to design a work programme **which will follow the report on the aims of general and vocational education.** This is an initiative of the European Heads of State and Government conceived last year in Lisbon. For their meeting next year in Barcelona it is planned that the programme be as concrete as possible. Subjects which are especially interesting for adult education centres are, e.g., a basic education for everyone including adults, teacher training and further training on all levels including adult education. Special emphasis lies on the creation of a new basic education designed to complement the previous education: with learning skills, basic knowledge in the field of information and communication technology, foreign language skills, with basic scientific and technical skills for all, but especially for women and girls, with a spirit of enterprise and with social skills. Other subjects touched on such as the quality of lifelong learning met with special interest in the German debate. For this best-practice examples were collected, indicators were developed and various forms of bilateral cooperation in Euroope were suggested. Due to the parallel discussion on the Memorandum on Lifelong Learning this workplan, which first concentrated more on the formal education system and its future, included the dimensions of adult education in ever increasing concreteness.

Before I go into the Memorandum on Lifelong Learning let me say a word on the voting process regarding our initiatives for education between the European level and the national level:

I believe the Commission is a catalyst and a stimulant for the ongoing process. It is only right that we operate within the legal framework of the EU contract regulating the power-distribution among the Community and the Member States, as written down in articles 149 and 150. It is vital to this process to acquire acceptance from all participants. Only if they are convinced by this approach will we be able to implement it successfully. With regard to education and vocational policy, which can never be a policy of harmonization, we put special emphasis on an exchange of information, experience and best practices and the ensuing a political dialogue on joint aims and strategies, and finally the committtment to achieve these aims and implement these strategies. **With this method the independence of national education and vocational policy is ensured. Nothing can be imposed on a Member State against its will.**

The Memorandum on Lifelong Learning met with mixed feelings in your circle. Some reacted with enthusiasm, others with reserve and scepticism. Please let me take up five theses from the debate, which could interest you particularly.

1. Lifelong learning does not only concern the economy and the job market but all areas of life.

In the past years the debate was led – especially in Europe – in a way that could lead to the impression that it was only concerned with lifelong adult training and further training for the workplace and the interests of business. After the Europe-wide debate a consensus has been reached which is aimed at striking a balance between the interests of business in lifelong learning and the interests of the individual citizen in learning processes: lifelong learning to participate in political life, to improve one's opportunities, to develop one's abilities to the full and for social integration. Adult education centres throughout Europe have always had the whole range of subjects in their programmes and many programmes today still reflect the "life-expanding" range of subjects, and in future these subjects will gain new importance.

Based on the feedback from the Member States the Commission will underline the importance of political education, which supports **active citizen commitment,** and clearly belongs to a basic education. This basic education must not be sacrificed in the name of wrongly understood priorities to career-orientated training. In future we will ensure that the demands from Member States for a verbal balance in the Memorandum between professional training on the one hand and political education, personality development and social-integrative training on the other hand correspond with a better balance of our funding priorities.

A Europe of knowledge needs a lively democracy with intelligent and brave citizens who have learnt to ask critical questions and to debate with others, to take issue and so to become competent political partners in new political fields. A lively democracy needs a lively political culture in adult education centres, which can be planned together with interested citizens and is not dependent on paying clients, but is the priority of public bodies.

The intercultural dialogues held in the past decades all over the country, the integration work with immigrants and refugees give the "knowledge-based-society" in Europe a clear ethical profile, a humane face. While other educational institutions are only now discovering the cultural dialogue, you have for years been organizing action days in protest at right-wing extremism, xenophobia and violence.

2. Lifelong learning is not only the concern of adult education but of all sectors of education.

The Europe-wide consultations on the Memorandum on Lifelong Learning have revealed how important reforms are which assist in making lifelong learning attractive from a very early age on – **in the family or in nursery schools**. As inequalities of opportunities for lifelong learning very often appear at an early age the task of educating parents and families, which was always supported by adult education centres in many European countries, is of even greater strategic importance.

Very often people who dropped out of **school** for various reasons are given a second or third chance with adult education. So we want to start with improving the first chances. Our pilot project "second chance schools" in cooperation with a German adult education centre with its day and evening classes has indicated that a reformed learner-centred school management, student-centered teaching and learning methods, cooperation with open-minded firms, multi-lingual and multi-cultural approaches are a vital help in decreasing school dropout and helping "school failures" try a new start.

This year we are promoting adult education and lifelong learning in Europe and on taking over the pilot project "second chance schools" we have realized how many adult education centres in Europe are already providing this important service. They are operaing under the most difficult financial, personnel and spatial conditions. **Instead of expanding adult education classes or the so-called "second course of education" it will matter more in future to change schools in Europe in such a way that lifelong learning is developed and these schools profit from the learner-centred and flexible approaches taken by second chance schools.**

The experiments, which are also supported by the Commission, with the "Socrates schools" which have become a movement in Europe, have shown that a divergence from the regular timetable, learning in project groups, a new advisory, supportive and accompanying role for teachers in the learning process of groups and individuals, equal access to all information sources for teachers and students, are feasible and can lead to amazing results.

There is a question from the Europewide debate on the **recognition of previously produced learning results** I would like to put to schools and adult education centres: why is it that subjects which were passed with very good, good or satisfactory at the first school need to be taken again when attempting to gain a final school qualification at evening school? Couldn't the subjects in which students did not fail in their final exam be recognized and certified with regard to the idea of lifelong learning? This would save cost and time when offering students the possibility to attain a final school examination and for the institutions that are being established all over Europe to access previously obtained knowledge and skills.

We will have to find solutions in Europe to enable a routine certification of partial achievements when studies or vocational training is broken off and to make the various sectors in the education system more interchangeable.

Apart from offering the possibility of obtaining a school qualification we need **up-dated open offers of basic education with a European dimension in a part-time or full-time format.** These offers should enable citizens to refresh their basic knowledge and skills in weekly, monthly or yearly courses. Many problems with actively processing information can be put down to insufficient background knowledge which is not provided by the media, although they too are obliged to provide education. Educational radio broadcasts together with the public media and the adult education centres have opened up such new horizons.If the financial situation of European adult education centres – possibly with our help – could be strengthened, these institutions could become new places for a basic adult education with a European dimension.

Universities, too, are required to adopt the idea of lifelong learning. This applies to their original task of teaching, where students are demanding a more learner-centred approach with better personnel and structural conditions. But this also applies to the demand for an opening up of the universities to all circles of society. The Commission is also working on a Europe-wide recognition of skills and knowledge acquired in one's professional or private life. The German adult education centres have, according to the conditions in the individual federal states, made a remarkable contribution to opening the universities to students who did not follow the regular educational path. This was achieved firstly by offering final school examinations and secondly by offering "study-ability courses" for those in work. This was done in close cooperation with several universities. A few universities have decided to open their doors to high achievers who would like to study for a trial period. They are admitted after a learner-centred interview and not after an exam.

The founding of academies and universities for senior citizens, who can participate on a braod base, was also an initiative of adult education centres. With their appropriate didactics and methods they have spearheaded a forward-looking developement.

These examples from other education sectors may show you that it is in your own interest if apparently impregnable bulwarks are turned into places of cooperation and partnership in the interest of lifelong learning.

You understand that these innovative movements, these small earthquakes are necessary for the European educational landscape and relieve you from continually doing the duty of a doorman.

A big part of the preparatory, "door-opening" educational work, which you traditionally do, should in future be achieved by open doors and the recognition of already existing knowledge and skills.

3. Lifelong learning requires a new learner-centred perspective. Adult learning should therefore be voluntary and tailored to students' needs.

The biggest part of adult lifelong learning in Europe takes place in longer-term courses that students seldom are able to choose and where they have to stay even though they see no progress or even if they would prefer to take up a job instead. It is an obligation and not an interest they abide by.

The biggest part of adult learning in adult education centres is initiated by the individual student voluntarily.

The programme is composed of modules, and everyone can assemble his or her parts from all fields of knowledge. Certificates are also offered for individual modules or exams in general education. But they are not an obligation.

I have heard that school teachers repeatedly come to adult education centres in order to offer their services free of charge. They are glad to be with people who are in general incredibly interested in the teacher's expert knowledge.

Especially in the area of vocational adult training this adjustment to the learner will lead to a radical change. The rules governing the choice of the most economical and the most experienced educational institutions for EU-funded schemes are very detailed. In future I would wish to have equally detailed rules for the learner-related management of the courses. This is where we need your advice and cooperation so that important European support instruments in our head office for education and culture and also in the others that promote lifelong learning are brought in line with the individual needs of learners.

- Accordingly in the adult education centres **innovative ways of learning from and with each other** have been explored. Here adult education, with its open and flexible, varied teaching methods, can exchange a lot within Europe and contribute to other education sectors. Many adult education centres already make use of study circles, workshops, future-workshops or open space meetings. Methods presented in the workshops concentrate on the whole person. Methods which provide "learning with sense and the senses". The person should agree to the learning process and understand it and not only learn or repeat details. The learner should put the matter learned in a wider context and "create the world anew while learning" as was the motto of the campaigns to combat illiteracy.
- Adult education centres belong to the few places in adult education where **learner participation** is very much requested on all levels. In several federal states there are elected student representatives. The adult education centre itself can be a place of active citizen commitment. Its **management** should be in accord with the principles represented in political education. Young people in the pilot projects of the "second chance schools", which partly have very open and flexible structures, learn about co-determination and co-responsibility. I would like to express my support.
- In the development of quality concepts the adult education centres belong to the trendsetters in Europe because they put great emphasis on evaluation by participants.
- So long as further education takes place outside public authority and is catered for by an ever expanding market, we must reinforce the position of the consumer. The German initiative for an education test foundation was keenly received by other countries.

Further education under public responsibility especially, must be taken to task on the issue of high standards for students in the knowledge society.

4. An important innovation for teaching and learning is the implementation of information and communication technologies.

In our **E-learning initiative** we analysed **the threatening gap in digital training and further trainiing.** Technologically supported forms of learning alone, in groups, in virtual groups or in correspondence courses are already exemplary in many adult education centres.

This is documented in the programme presented by you, and is also shown in the participation of individual centres in the Minerva and Grundtvig campaign of our Socrates educational programme which is presented here.

Especially adult education centres, with their proximity to otherwise excluded or disadvantaged sections of society, will need their own or integrated, but not shared, IC-centres with the right personnel, so as to enable group learning and to provide technological and pedagogical support for self-learning.

In this area there is still much scope for public investments in lifelong learning: investments which very often seem to exceed municipal and regional financial possibilities. Here there is a need for joint efforts by all towns and regions involved in learning and teaching to bring together industry, cultural and educational institutions and NGOs. The special contribution these new technologies provide for certain groups such as long-term ill people, who cannot participate in the traditional educational systems, should be a focal point. For the good of all everywhere in Europe, excellently equipped institutions with technology supported learning systems will have to open their doors to other sections of society and question their legal purpose. **But disadvantaged people cannot rely on second hand learning possibilities for ever.** This is why the head office of education and culture, through the Socrates-Grundtvig project, is providing access to information and communication for people with special needs such as visually impaired people or people with a hearing and speech impediment, for cronically ill people, for people in prison, for women in rural areas, for refugees and migrants, just to name a few. Institutions in deprived towns and regions have already successfully used money from the European social and regional fund to improve the regional and local infrastructure.

Last but not least, please let me say a word on the financing of lifelong learning against the background of the Memorandum debate.

5. Lifelong learning requires economical thinking based on long-term investment in intelligent minds.

The language of business that speaks of " human resources" or of " human capital " has often been criticized in the feedback process of the Memorandum. The Commission has tried to breach the gap in the traditional definitions of business and cost calculations now also often used in public institutions.

The essential turn in the debate, in which a wide degree of agreement was arrived at, was established with the fact that financing lifelong learning does not mean unbearable "costs" for firms, towns and communities, regions and states in Europe, but rather a future investment in the skills of their citizens.

Here we can see a radical change in thinking on all levels. A Europe of knowledge can only develop dynamically and competently if it learns to take investment in lifelong learning of people just as seriously as it takes investment in machines, buildings or workplace infrastructure. Public spending and industry in Europe are both required to rethink their accounting and finance planning to meet the demands for lifelong learning for all. **Lifelong investments in intelligent minds will be among the most lasting investments in Europe.**

Perspectives: More German Participation in the Socrates-Grundtvig Programme

Lifelong learning in all fields will need a greater European and international dimension. Especially thanks to the sustained efforts of our colleagues Ms Süssmuth and Ms Pack, among others, we managed a breakthrough with the programme Socrates I in the promotion of adult education. That is why I am very happy that approx. 25 adult education projects which were supported by us under Socrates I until 1999 and can show particular sucess were prepared to present themselves in the exhibition area at this conference of the German adult education centres and that further, currently still running Grundtvig projects will present their ideas and prospects in various workshops. At this point I am pleased to greet the project co-ordinators who have come from all over Europe and to thank the European Association for Education of Adults for the excellent preparation of the presentation.

In the second promotion period we named the project "Grundtvig" after a very influential Danish adult educator. As some of you already know, it not only gives you the possibility to receive funds for new ideas and initiatives but also to give them future prospects by facilitating parallel development, acceptance and sometimes even formal recognition.

In comparison to other European countries I would wish for a considerably larger participation of German adult education centres, contributing all their competences. It is still possible to start learning partnerships in adult education with a European direction within the framework of "Grundtvig". Finally I would like to invite you to use the competence in lifelong learning German adult education centres undoubtedly possess, and to offer further training for colleagues from other European countries. Your programme in the area "learning in international cooperation" reflects an impressive depth and range of activities.

On the other hand you should encourage your colleagues to attend further training in other European countries. What seemed exotic some years ago will in future strengthen the European and global competence of our adult education centres. That is why under Grundtvig 3 a scholarship was introduced for employees in adult education. We have increased the funds for this important mobility and hope that you as a learning organisation, as you present yourself in your programme, will support your staff and teachers on their way towards Europe.

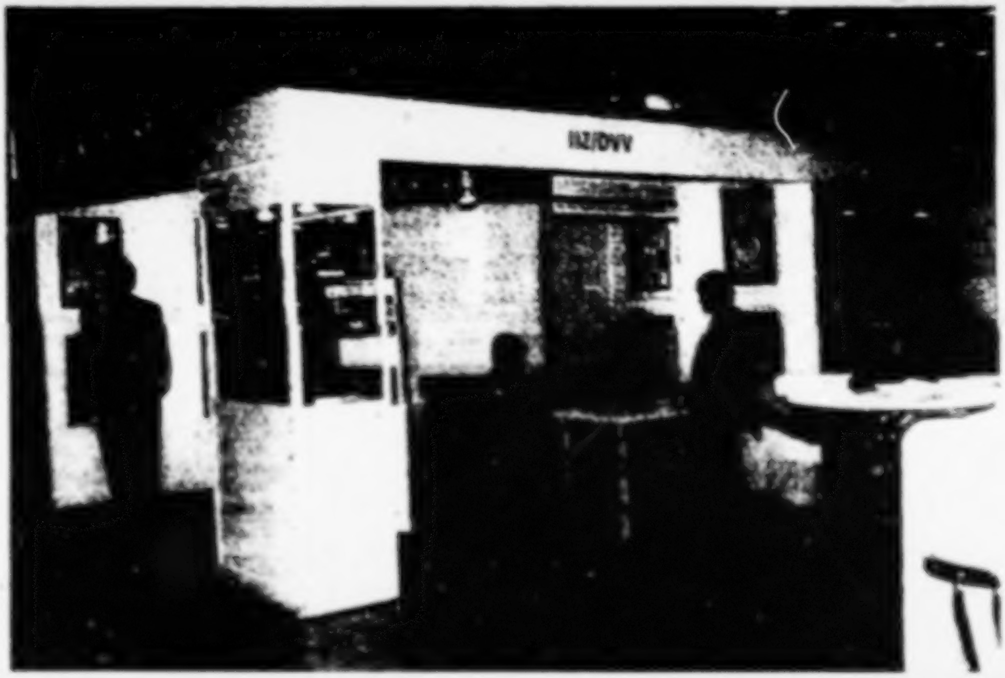
Educational holidays and sabbaticals will not only supply the necessary "storm in the heads" but also influence the quality of future adult education substantially.

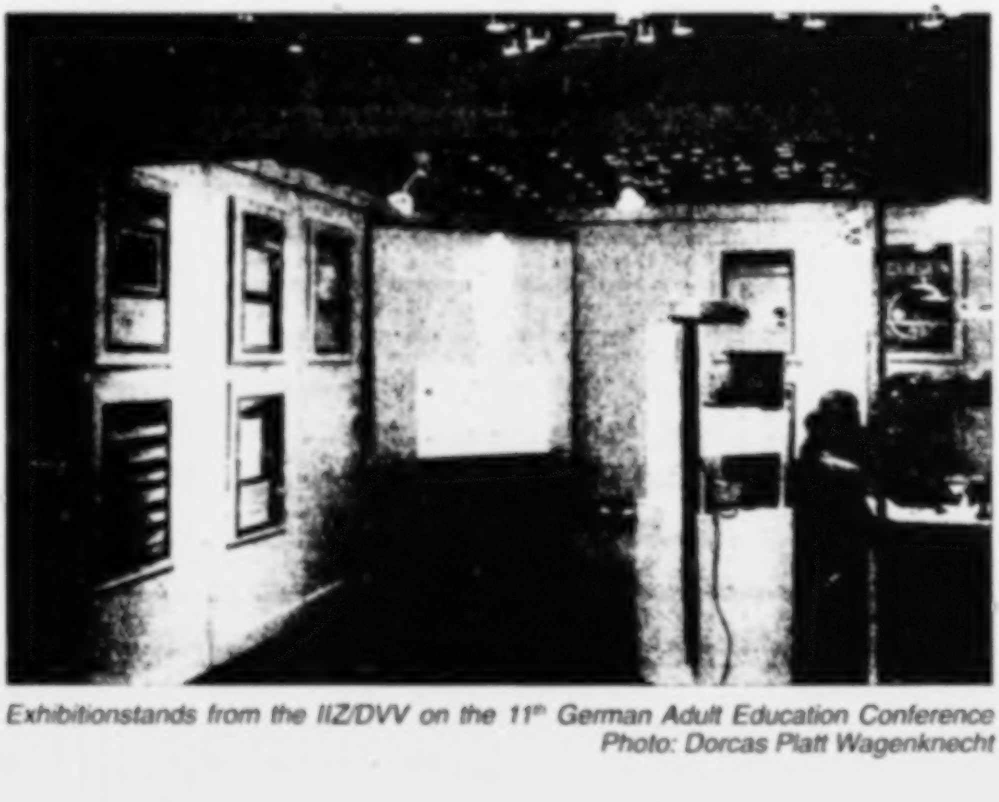
If you set an example you support the initiatives of employers and unions to develop European companies into learning organizations. The unemployed can enjoy a trial working opportunity and substitute for employees, who receive the possibility to find further training on educational holidays or during a sabbatical. Already the average training period in European companies amounts to 38.5 hours.

At the same time I would like to invite you to profit from our networks under Grundtvig 4, to visit the European meetings of the networks and to make use of their various products. Of the currently funded projects I would like to point especially to the second chance schools in Europe, to the networks of learning cities and regions and to the research networks in adult education. Finally, if you see a demand, you might consider – with our help – establishing a European network in your specialist area.

You can get further information from our project co-ordinators here at the conference and at our joint stand with the Carl-Duisberg-Gesellschaft, where you can get further advice on the above mentioned scholarships for employees in adult education. Additionally there are two colleagues from the Grundtvig team (Alan Smith, Maria Oels) present in forums and workshops who will be happy to provide you with further advice.

Here in Hamburg, four years ago, at the CONFINTEA Conference on Adult Education the talk was of the **enjoyment of learning**, of celebrating learning and of learning festivals. The latter are now celebrated all over the world. I hope that you will experience this enjoyment at the talks, the international gatherings and discussions at this conference venue. **We need your local competence, your expert initiative and your international broadmindedness for the future of lifelong learning in Europe.**





Exhibitionstands from the IIZ/DVV on the 11th German Adult Education Conference
Photo: Dorcas Platt Wagenknecht

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Franz Nuscheler

Globalization: Is the South Losing Touch?

The Globalization Debate: Outline of the Arguments

Globalization was all the rage in the 1990s, and the supposed cause of every imaginable sort of development and every discernible trend, aspiration and fear. Some saw a golden age on the horizon, while others saw the opposite. This imprecise term had to serve a whole range of purposes, whether as a way of attacking the variation in social and environmental standards between different locations, as a "prime excuse" for shedding nation-states' responsibility for the failure of economic and social policies, or as a scenario of the future warning of the wrong direction being taken by the entire world. It was widely demonized, but seldom analysed.

The terrorist attacks of 11 September were interpreted as a perversion of globalization, demonstrating the vulnerability of the entire world to individual violence. The al-Qaeda terror network was organized like a multinational corporation that knew how to exploit to the full the destructive potential of globalization.

There were scenes not dissimilar to civil war on the streets of Seattle before the opening of the "Millennium Round" of WTO talks in December 1999. These scenes were later repeated on the fringes of the annual meetings of the IMF and the World Bank, and culminated in an orgy of violence at the G8 summit in Genoa in summer 2001. Banners denounced the demonic scapegoats of globalization, the WTO and the IMF.

The media quickly lumped very differing groups of peaceful demonstrators and violent trouble-makers together under the term "anti-globalization protesters". This composite international movement, which varied widely in background, origins and political leanings, was demonstrating against a whole range of things: Third World groups from around the world against trade rules disadvantaging developing countries, human rights groups against the exploitation of child labour and against multinational corporations operating worldwide, women's groups against appalling employment conditions in "world market factories" in exporting areas, environmental groups against free trade which threatened to turn ecological ruthlessness into competitive advantage, consumer associations against the worldwide spread of genetically modified foodstuffs, and left-wing groups against global "turbo-capitalism", or "predatory capitalism" in Helmut Schmidt's words. Even the international speculator George Soros was using such polemical terms.

What still unites the opponents of globalization with each other and with many contemporaries is fear of the dangers of globalization, either anticipated or already identified. They oppose "commercial terrorism", which threatens to give competition and the profit principle supremacy over the social and ecological well-being of the world in the ideological name of neo-liberalism; and they criticize the oligopoly of the rich and powerful who attempt to hide behind police lines and democratic controls. Together they demand that globalization be shaped democratically according to the principles of justice and sustainability. They therefore deserve praise rather than blame – as long as they do not resort to violence.

Following Genoa, this global protest movement succeeded in stimulating a broader public debate about the opportunities and dangers of globalization and, as I experienced as a member of the German Commission of Inquiry (the "Enquete Commission"), its criticism was greeted more sympathetically than before. The NGO "Attac" even managed to have the "Tobin tax" on speculative currency markets, which had been so roundly condemned by bankers and by many economists and politicians, put back on the political agenda.

The following argument is crucial. Globalization cannot be stopped. It is a "megatrend" of world history. However, it is not a fated natural event

121

but the result of an intentional political strategy, called neoliberalism, which was devised in the control centres of world economic and political power. All that can therefore be done is to set up social and ecological fences to pen in and tame this particular horse before it gallops away: in other words, to influence globalization by political means.

The Winners and Losers of Globalization

The apologists for globalization proclaim that they bring good news: liberalization of markets has the effect of encouraging growth, and more growth means a better standard of living. But where and for whom? The critics of globalization protest that its blessing only extends to the powerful in the world economy, is of benefit to few developing countries, and then generally only to the minority. An example of this debate appeared in the *Süddeutsche Zeitung* (of 29-30 September 2001): while the economist Carl Christian von Weizsäcker declared the globalized world market to be the "engine of prosperity", the "opponent of globalization" Susan George contended that "profits are exploding; the poor are losing out". Similar disagreements were argued out in the Enquete Commission on the "Globalization of the World Economy".

The two sides have a plethora of data with which to back up their claims. And both sides need to be heard in political education. Globalization has winners and losers, both at state level and within the society, in North as well as South. It is an extremely ambivalent phenomenon, facing both ways like a head of Janus. On the one hand, it offers competitive threshold countries fresh opportunities in the increasingly deregulated world market, and on the other, it threatens yet further to marginalize whole regions economically and politically. This ambivalence makes it difficult to reach a balanced judgment.

The *Human Development Report 1999* produced by the UNDP contains plentiful evidence of "globalization without a human face". The image of a "global apartheid" of life-chances derives above all from the huge social disparities between the richest and poorest fifths of the world population. According to the UNDP, the gap in income between these two groups more than doubled in the four decades between 1960 and 2000. But can this growing inequality really be blamed on globalization?

Quite apart from all the factors impeding or even totally preventing development – wars, corruption, falling prices of raw materials, high population growth rates, AIDS and drought – the statistics themselves tend to exaggerate the increasing divergence between rich and poor. This can be seen in the following mathematical example: if annual income per head of around US $ 26,000 in the richest countries were to grow by a mere 1%, this would still mean 260 dollars; if annual income per head of around US $ 420 in the poorest countries were to grow by as much as 10%, it would still only amount to 42 dollars. It would therefore be wrong to apportion blame hastily on the basis of such calculations. Nevertheless, these figures do demonstrate the tendency for the poorest countries increasingly to lag behind development in other world regions.

Any answer to the question whether the South is losing touch also needs to take into account the three fifths that lie between these extremes. Globalization has the effect of excluding some and integrating others. The oil-producing countries are not losing touch. Their raw material is desperately needed by the industrialized countries, and they are becoming attractive export markets because of high foreign earnings; they are indeed catching up. The threshold countries in South and Southeast Asia, and in Latin America, have also not lost touch. They offer significant export markets and investment opportunities, and produce high-value consumer goods and foodstuffs, and some of them offer online services. India is both a poor region and a major software manufacturer training IT specialists who are in demand worldwide.

The threshold countries, or "emerging markets" in commercial jargon, are exploiting the opportunities offered them by an increasingly liberalized world market. But they needed to become competitive first by pursuing astute development policies. They have been the winners of globalization, and the industries that are no longer competitive here at home have lost out. Globalization calls for structural adjustment in the North as well as the South, and this has its social costs. The brutal principle of competition is "Adjust or die!" The rich societies, however, have more options and room for manoeuvre in making these adjustments.

Flows of Trade and Capital as Indicators of the Relative Positions of Groups of Countries

Capital flows are a good indicator of structural change in the world economy. They provide evidence both of the inclusion of economically attractive and politically stable parts of the South in the process of globalization and of the exclusion of losers in the global jockeying for position. The losers are located in Africa, in South Asia, in parts of Latin America and the Caribbean, and in the former Soviet Union. Of approximately US $ 200 billion flowing into the "South" in the form of direct investment in 1998, only 5 billion went to the Least Developed Countries (LDCs).

The bulk of direct investment flowed into a dozen threshold countries in the Far East and Latin America, the largest individual proportion going to China, the coastal areas of which are developing into a "super emerging market". The mass migration of workers which this has set in train is typical of the worsening inequality in development between coast and hinterland, and is known by dependency theorists as "structural heterogeneity". It is occurring wherever "global cities" are being created as focal points of development, with stronger links with the outside world than with their own hinterlands. The drive towards modernization is frequently restricted to small enclaves.

According to forecasts by the WTO and the OECD, almost all groups of countries will benefit from the liberalization of world trade – with the exception of the raw-material producing countries in sub-Saharan Africa, which can generally only export those raw materials after low-level processing, with proportionately little added value. While the successful growth and development in the Far East are largely due to the export of competitive industrial goods, the raw-material producing countries are lagging even further behind the expanding world economy. But they are not losing touch as a consequence of globalization. The cause is too little, rather than too much of a share in globalization, and the inability to hold their own in international competition.

Many developing countries are more marginalized from the world economy than at the time of decolonization. There is diminishing demand for, or an excess of, what they can offer – raw materials and cheap labour. Tiny Singapore, on the other hand, exports more in value terms than a country the size of Russia. The reason: it is no longer tons weight that matter in international competition, but kilobytes. Raw materials, the prices of which fluctuate widely and are tending to fall, have no future as a basis for development. This is not as a result of the dark forces of globalization, but of the simple mechanism of supply and demand. Development policy needs to help to improve international competitiveness.

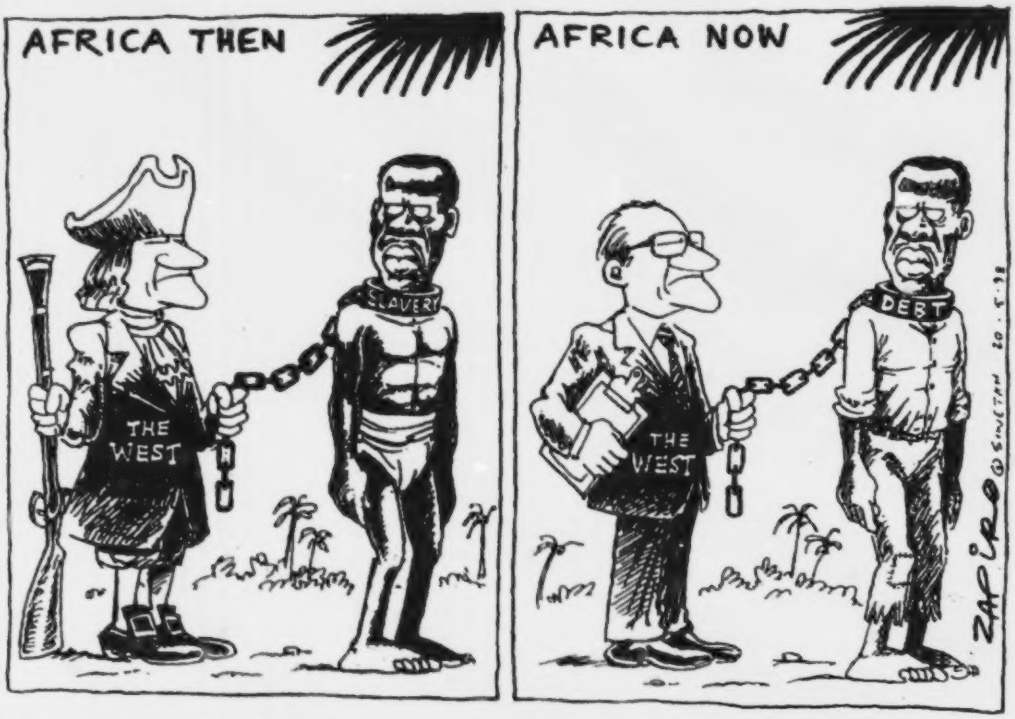
Africa was already economically marginalized and dependent on drip-fed foreign aid before there was any talk of globalization. The vast majority of African states have not even been able to take advantage of the preferential trading arrangements granted them by the EU under the Lomé Conventions. The upshot is that Africa is increasingly losing touch with the expanding world economy and is reliant on survival aid from outside. Furthermore, the example of Mauritius, which has developed from a moribund monoculture based on sugar into a dynamic emerging market by exploiting the opportunities of globalization, demonstrates that the legacy of a colonial economy is not an insuperable obstacle. This achievement was made possible by a vigorous assault on structural problems rather than by development aid.

The Digital Divide

Development is a matter not only of flows of capital and trade but also of access to knowledge – alongside many other factors in the internal life of a society. There is a wide gap also in the field of communications between North and South, rich and poor. The *Human Development Re-*

port 1999 calculated that the poorest fifth of humanity had access to only 0.2% of the Internet hosts available worldwide, and to 1.5% of telephone connections. High prices and charges have meant to date that only privileged minorities can share in the globalization of communications. On the other hand, mobile telephony is reaching remote villages, and giving them the opportunity to communicate with the outside world.

The marginalization of the poorest countries, and of the majority of their populations, is reinforced by limited access to modern communications technologies, which in turn reduces opportunities for development. This illustrates clearly what is meant by talk of simultaneous globalization and fragmentation. In other words, while the world may be more closely interconnected by global telecommunications, there are deepening divisions within the "global village", that romantic vision of world society. This reveals another important new task for development policy: helping to spread new communications technologies outside the "glob-



Source: epd-Entwicklungspolitik 7/2001, p. 18

126

al cities". A start has been made, given impetus by both the World Bank and the G7 at their most recent summit meetings.

Intermediate Summary

Ralf Dahrendorf's answer to the "common survival interests" of North and South posited in the *Brandt Report* was short and conclusive even then (i.e., in 1980): on economic grounds, the North had no need of large parts of the South. The question remains whether the North can afford on political and moral grounds to leave the poor regions of the world, which are also the wellsprings of crisis, to the consequences of naked commercial profit-and-loss calculations; can long-term political reason overcome short-term economic reasoning?

These questions became highly topical after 11 September 2001. The "holy warriors" of the *jihad* declared war both on the hegemony of the West in world politics and the world economy, on their own political disenfranchisement, and on the social polarization of world society. Social exclusion and political humiliation are the seedbed of all forms of radicalism.

The "New South" = "The Mass of the World Population"?

Thus, the question is whether and in what way globalization causes or accentuates poverty in the South. It is often described by the sociologist Ulrich Beck, who has written a whole series of publications on globalization, as "global social Darwinism", increasing the wealth of the few and the impoverishment of the many. The economic and social geographer Fred Scholz has introduced the term "New South", as a universal social category, to describe the "rest of the world", and hence the "mass of the world population", who are excluded from globalization. He depicts the following horror scenario:

> *"It can act as a dumping ground for all kinds of used goods and cheap products, and may sometimes be the recipient of alms and disaster aid and the target of military peace-keeping exercises... But this marginalized left-over world, the New South, will generally be*

> *doubly out of touch and left largely to its own devices. It will fret out its own internal contradictions and fragment through its own morbidity, and it will suffer from violence, poverty and backwardness."*

Does this social disaster in the "New South" really apply to the "mass of the world population", as Fred Scholz maintains? The description is reminiscent of reports from the impoverished regions of Africa and South Asia, and from the slums of Manila, Cairo, Rio or Harlem, but the "mass of the world population" does not live in such dreadful conditions. Here too, globalization is blamed for all the misery in the world.

It is a horrific vision from the best-seller *Globalization Trap* that globalization must almost automatically lead to an 80/20 society, in which 80 % will be losers and only 20 % winners. This prognosis may make a striking journalistic effect, but it is not backed up by sound analysis of the development trends that are already discernible. The success stories of the "Asian tigers" in the Far East are due not only to above-average growth rates, achieved principally thanks to increased exports generated by foreign companies, but also to their exploitation of export-led growth in order to implement active social policies. A good part of their success as exporters has been due to the opening up of markets and the inflow of foreign capital.

People's impoverishment and exploitation cannot therefore be laid entirely at the door of globalization. It is being made a scapegoat for problems that are by no means new. Many accusations now being levelled against globalization used to have different targets: the world market, the IMF and the World Bank, the "multinationals", and political and economic imperialism. Long before there was talk of globalization, colonialism had reached almost every corner of the globe and took what it wanted with force. Much of what is currently written about globalization is already to be found in Karl Marx.

Globalization from a Women's Perspective

How has globalization affected the situation of women? For feminists such as Christa Wichterich (1998), the "globalized woman" is exclusively a victim in the global market place. In the World Bank's view, on the other hand, women are among the winners of globalization since their employment rate rose markedly in the 1980s and '90s. But this rising level of employment says nothing about working conditions. There are good reasons why the ILO (the International Labour Organisation) is no longer calling for "work for all" but for work for all that is "fit for human beings".

Firstly, additional jobs for women have been created in the 600 or so export zones or "free production zones" set up by many developing countries with low wages and appalling working conditions. According to the findings of the ILO, 70% of these workers are women, usually young women, and the proportion is nearer 90% in the labour-intensive textile factories manufacturing cheap textiles of all kinds for the West. Members of local trade unions bemoan the exploitation, but accept it through gritted teeth for want of any alternative, and fight for small improvements such as shorter working hours, re-employment after sickness or childbirth, and freedom for trade unions to operate.

Secondly, globalization encourages female migration: the international trade in women that sells hundreds of thousands of women from the poor regions of every continent into prostitution. Worldwide, according to conservative figures from the German Federal Office of Criminal Investigation, around 200,000 women and girls are sold every year to other countries as brides, cheap labour and prostitutes. *Terre des Femmes* puts this figure as high as a million.

Thirdly, women carry the burden of providing for the entire family if the husband is unemployed or underemployed and is either unable or unwilling to earn a living wage. Women have been and still are the victims of structural adjustments, where these have led to the abolition of basic social services. The "feminization of poverty" cannot be blamed solely on globalization, but it has certainly contributed wherever women form a reserve army of labour for underpaid activities, and the ability to exploit them has become an accepted advantage in global competition.

However, feminists themselves see the international women's movement as providing effective shock troops for "globalization from below". The "globalized woman" is fighting back against grinding globalization, and is starting to take control. The Indian sociologist Shalini Randeria, who teaches in Berlin, has stated for example (1998) that: "The international women's movement is among the political forces helping to shape counter-hegemonic globalization."

The Ecological Dangers of Free Trade

Ever since the appearance of the classic work by Adam Smith (1723–90), *The Wealth of Nations*, it has been part of the creed of liberal economic theorists and politicians that export trade which is largely free of state intervention and protectionist measures is of advantage to all traders. If free trade produces wealth for all, why were there such militant protests in Seattle and Genoa against further liberalization of world trade? Environmental groups from around the world united because they believed that unfettered free trade would exacerbate global and local environmental problems. Ecological criticism of free trade, encouraged by globalization, focuses on the following, already discernible developmental trends:

Firstly: Growing economic activity and wealth go hand in hand with take-over of land, higher consumption of energy and raw materials, and emission of greenhouse gases. If growth is the declared aim of liberalization of trade, and competition prevents states from restricting the use of resources, then globalization is helping to exacerbate the global environmental crisis that is going to affect the South more than the North. The head of UNEP, Klaus Töpfer, therefore speaks of "ecological aggression by the North against the South".

Secondly: The expansion of world trade through the removal of trade barriers leads to far more transport activity by land, sea and air. The revolution in transport has reduced the costs and time required for transportation, but has increased damage to the environment through higher CO_2 emissions, which are one of the main causes of the greenhouse effect. The internationalization of production, brought about by the division of its stages between locations widely dispersed across the globe, leads to much greater use of transport. Many products have already travelled long distances, some parts further than others, before appearing in the shops here at home. The growing mobility of people and goods across a multiplicity of borders is both a feature of globalization and a serious ecological problem.

Thirdly: Increased international competition may lead to "eco-dumping" if lower spending on environmental protection can give a particular location a cost advantage. Many developing countries competing for foreign investment are prepared to offer themselves as homes to "dirty industries". Domestic and foreign businesses are then able to produce with little environmental expenditure and to export more cheaply. This is a distortion of competition, making eco-dumping a competitive advantage and penalizing those who invest in environmental protection. This is particularly the case in industries such as iron and steel, engineering, chemicals and paper, which cause high levels of environmental damage. The Far Eastern "tigers" owe a good proportion of their competitiveness to this ecological ruthlessness, which is in stark contrast to the model of "sustainable development". The conflict of interest between free trade and environmental protection will only cease if the external costs of environmental damage are reflected in prices, i.e. "costed in".

Fourthly: The liberalization of international trade in agricultural products promises exporting countries higher profits but causes them to develop ecologically disastrous monocultures, to overexploit their natural means of survival, and to neglect the domestic provision of food from their own resources. For example, the terrible forest fires in Borneo, which were responsible for a third of the world release of CO_2 in 1998, were attributable to plans by the Nestlé corporation to grow palm oil on the burnt-out areas. The agriculture agreement sponsored by the WTO which opens up developing countries' agricultural markets threatens the livelihoods of many millions of small farmers, who have until now been supplying basic foodstuffs to local markets.

The question is whether all these environmental sins can be blamed on free trade and globalization, or rather on irresponsible actions by states, companies and consumers. Long-distance trade can only grow if there is a demand. Unenlightened consumers in the "OECD world" are after all demanding cut flowers, grapes and strawberries in the winter from sunnier regions of the world.

So far, trade protectionism has generally only brought harm to developing countries without doing much for the environment. Developing countries and environmental groups in the South therefore treat the debate about the internationalization of environmental norms with great mistrust. What they want from a new world trade order is not the imposition of social and ecological restrictions, but the creation of fairer conditions of trade, the removal of protectionism (especially the EU's agricultural protectionism), a greater share in the profits from trade that flow to the beneficiaries of the WTO, and indeed more influence within the WTO, which they suspect of being an instrument of Western interests like the IMF and the World Bank.

Globalization and Human Rights

Human rights groups fear that globalization may undermine all the progress made in establishing a package of human rights as the norm. Social rights are undermined by deterioration in living and working conditions, women's rights by greater exploitation in "world market factories" and the growing intercontinental trade in women, and children's rights by the expansion of child labour and child prostitution. According to the 2001 annual report of Amnesty International, the growing economic pressure brought about by globalization in all societies poses a systemic threat to human rights. Are these fears justified?

The opening up of markets for capital, goods and services, and competition between locations, have weakened the ability of states to impose minimum social standards and have strengthened the negotiating power of multinational corporations. Their transnational structure also weakens the power of national trade unions to organize.

Social rights are intended to humanize globalization, but they have little regulatory power, while the power of capital, which is driving globalization forward, is enormous. It is certainly true that "multinational-bashing", as still practised by large parts of the "Third World movement", does not do justice to the behaviour of some thoroughly responsible "multinationals". They are not all ruthless exploiters that will climb over corpses if they have to, as in the example set by Shell in Nigeria. But nor is the position regularly taken by Hans-Olaf Henkel, the President of the Federal Association of German Industry (BDI), quite that clear-cut: "Democracy, the market economy and human rights belong together like equal sides of a triangle." In the "New South", experience tells us that this equality is not always in evidence.

It has become evident, however, that globalization can also stimulate democratization, "good governance" and decentralization:

1. Globalization has made not just the market economy, but democracy as well, the universal model, and is placing dictatorships under pressure to justify themselves. The "open skies" of global communications ensure that the message of human rights cannot be kept out of their territories; they produce more freedom of information than all the human rights conventions put together.
2. Nation-states are called to account internationally in the same way as companies operating worldwide, because their actions are increasingly measured against standards applicable globally. The media, reporting from the entire world, are creating a world public, which is feared by both dictators and powerful "multinationals". This "CNN factor" has a powerful influence on international relations, and not only in times of war.
3. NGOs networking across borders are increasingly intervening in issues concerned with human rights, the environment and development in states' domestic and foreign policy, and are using the legal force of international agreements to exert pressure on governments. By means of sophisticated campaigns and international networking, they have persuaded a growing number of companies to make voluntary social and ecological commitments. Exploitative child labour has, for example, been restrained by civil society watchdogs and "biting dogs" as much as by the UN Convention on the Rights of the Child. World politics has not yet been "NGO-ized", but private agen-

cies are intervening effectively in world politics, with the result that UN General Secretary Kofi Annan has spoken of a "silent revolution" taking place behind the scenes in the rituals of state relations.

4. Because overstretched central governments can no longer control everything from the "top down", there is growing room for manoeuvre for regions, groups and individuals. New political networks have come into being at all levels of political action, in which state and private agencies are looking for joint solutions to problems. Politicians and bureaucrats have recognised that they need the management potential of companies, the knowledge of academics and the committed involvement of the civil society. Politics no longer functions as it did in Bismarck's day. Centralized institutions are facing calls for decentralization everywhere. "Top-down" is out, "bottom-up" is in.
5. The pressure of globalization has also fostered various regional cooperation and integration projects, which enable weak forces to combine. Africa too has made another attempt to free itself from its powerlessness by setting up an AU (African Union).

There are Ways of Escaping the "Globalization Trap"

Given its many potential dangers and advantages, it should be evident that it would be as unwise to condemn globalization out of hand as to romanticize it uncritically. It is neither the work of the devil nor a gift from heaven, either in North or South. Equally, lamenting the "powerlessness of politics" is of little help. Such defeatism may even provide an excuse for failure to do what is obviously needed.

The globalized economy needs a social and ecological framework, which can only be given it by globalized political action. This must produce agreements on binding social and environmental norms which can prevent even global "predatory capitalism" from making as much profit as possible at the expense of people and the natural world. It is the task of politics to shape globalization according to a normative yardstick of global well-being that will prevent the supposedly inescapable fate so horrifically described by the two authors of the *Globalization*

Trap. Many people are therefore now turning their attention to "global governance".

The Vision of "Globalization with a Human Face"

The *Human Development Report 1999* speaks first of "globalization without a human face". Millenarian auguries of disaster warn apocalyptically of "global war of all against all". But the UNDP report also sets out a vision of "globalization with a human face", which would aim at:

- fewer violations of human rights
- less inequality between and within societies, generations and the genders
- less marginalization and exclusion of countries and people in inhumane living conditions
- less insecurity of income and vulnerability for people and countries, and hence more "human security"
- less environmental destruction that will leave future generations with irreparable damage, less wastage of diminishing resources, and more sustainability of production and life styles

The message from the UNDP is unmistakable: *"Strong political control is required in order to secure the benefits of globalization for the well-being of people and not merely for the sake of profit."* The motto must therefore be: Stop moaning and influence politically what cannot be prevented. Development policy must be reborn as "global structural policy" in order to help the "halt and lame of the world economy" to take advantage of the opportunities of globalization. What is needed is solidarity between the strong and the weak, within regions as well between regions.

The guiding model is provided by a social market economy which does not rely solely on the "unseen hand" of the market. Even Adam Smith, the prophet of liberalism, realized that the market must be set within a regulatory framework so that its constructive energies can flourish. What applies at the national level must now be transferred to the global economy and global policy. This is precisely what is meant by "global governance".

Marcie Boucouvalas / John A. Henschke

Reflections on International Cooperation and New Partnerships in the "Age of Globalization"

The "age of globalization", emerging as an increasingly familiar phrase over the past few decades, has become a focal point of both celebration and concern for the twenty-first century. The term, originating from the field of economics, took root as the movement of goods and services, especially through trade and financial flow, across international borders. Globalization has been celebrated as potentially enriching to the fostering of cooperation, collaboration, partnerships, and progress. It has also raised concern, however, in the world of adult education.

This concern permeated the 6th World Assembly of Adult Education, held in Ochos Rios, Jamaica, during August 2001, by the International Council for Adult Education (ICAE). In his opening address to the Assembly, the Rt. Honorable P.J. Patterson, Prime Minister of Jamaica, reminded adult educators that *"globalisation is not a tide which necessarily lifts all boats... the stark facts indicate that it sinks many."*

The Declaration that emerged from the World Assembly echoed a similar concern: *"we have seen an economic globalisation that widens the gap between the haves and the have-nots"* and *"we have taken notice of the large number of people from all corners of the world who ...have expressed their profound concerns about the directions proposed by global financial actors."* Simultaneously, however, the voice of hope was also heard in the Declaration: *"we have taken notice of emerging* *forms of active citizenship and the importance of local and grassroots activities in challenging globalisation."* [1]

The challenge, of course, is in more than just monetary terms. In the New Economy information is heralded as an important commodity, so to speak. As further stressed by Patterson, *"the global economy is today information-intensive, not material-intensive,"* meaning that *"wealth has to be re-defined in terms of knowledge-rich versus knowledge-poor countries."* Consequently, *"people have to be constantly updating their knowledge,"* not just for economic growth, but for *"the values and norms necessary for democratic citizenship; ...information will make citizens aware of the challenges, threats, and opportunities of globalisation."*

Accordingly, the term globalization has come to mean much more in the world of adult education. For example, Paul Kennedy has urged the field to focus on "knowledge" rather than "material" globalization,[2] and Franz Poeggeler, reflecting upon his writings and thoughts over the years, has urged all adult educators to consider the term "globalization" as a way of thinking as "One World," reminding us that in the past "nationalistic imperialism [has] ended in a catastrophe of narrow-mindedness." [3]

The time is now ripe. Globalization in both theory and practice is emerging within the context of what has been termed the postmodern movement, ushering in a world in which a plurality of voices and ways of knowing is heralded. Out of the postmodern framework has emerged constructivism, which in practical terms is expressed as the movement toward diversity and inclusiveness, recognizing that cultural ways of being create different perceptions of the same phenomenon. These advances, though, presuppose the developmental prerequisite that one is able to sustain the tension inherent in having multiple perspectives existing side by side because one is able to grasp and embrace the greater whole of which the perspectives are part.

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[1] For further reference see the web site of the International Council for Adult Education, organizers of the Assembly (http://www.web.net/icae), e-mail at icae@icae.ca, Telephone: ++(416) 588-1211, Fax: ++(416) 588-5725

[2] Source: Kennedy, P. (2000). Global challenges at the beginning of the twenty-first century. Adult Education and Development, 54, 7-20.

[3] Source: Poeggeler, F. (2000, August). The globalization of adult education and the idea of One World: Aspects of history, presence, and future. Keynote address presented at the 8th International Conference on the history of adult education. Pecs, Hungary: University of Pecs.

The meaning in life derived from being and feeling a part of a greater whole is called homonomy and is a complementary developmental trajectory to autonomy (development of the individual, unique, autonomous, separate self-sense). As discussed in earlier papers,[4] these terms apply to development of individuals, relationships, groups, organizations, and nations. Individuals develop healthy autonomy, but derive meaning also from identifying with a relationship, group, or even nationalistic fervor. Balance between autonomy and homonomy, however, is a key. Groups, organizations, and nations likewise, develop autonomous identities, but what happens when homonomy is missing? Any time the autonomous identity truncates off, and fails to see or identify with the larger whole of which it is part, centrisms arise, some of which can be deadly. Ethnocentrism, nationalistic imperialism, and hegemony are recognizable examples. Today, however, we all face this challenge together, particularly in the light (or darkness) of terrorism. Terrorism may be seen as homonomy gone awry.

Since we hail from the USA, this backdrop holds special significance for us at this moment in history. Given the now well-known events of September 11, 2001, we – as United States citizens and residents, but also as global creatures – recognize that Americans have been given an opportunity to better understand the suffering of humanity that we have now joined. In other words, we can no longer stand outside of where pain and sorrow exist in the world. We have been "terrorized" and the lesson is huge for our own further development. As citizens of the world we must learn the adverse ramifications of attempting to maintain an autonomous identity as Americans without equally embracing the larger whole (i.e. the world) of which we are part.

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[4] Source: Boucouvalas, M. (1988). An analysis and critique of the concept "self" in self-directed learning: Toward a more robust construct for research and practice. In Proceedings of the TransAtlantic Dialogue Research Conference, pp. 55-61. Leeds, England: University of Leeds and Boucouvalas (1999). Toward a civil society: Balancing autonomy and homonomy: Developing a research agenda and action plan for adult educators. Paper presented at the International Conference on "A Century of Adult Education Experiences: What are the lessons for the future?" Uppsala, Sweden: University of Uppsala.. Contact author for further information (marcie@vt.edu)

With that perspective we offer our thoughts on "international cooperation and new partnerships." Three questions have been posed to us that we will address accordingly. How and with what attitude we all choose to connect, however, is as important as why.

1. Which are the New Aims and Forms of International Cooperation in this Age of Globalization?

In the Cape Town Statement,[5] the following is suggested as one answer to the first question:

> *"International partnerships and linkages ...[occur] ... when lifelong learning institutions in the globalising world strive for a broad exchange on teaching/learning systems, and collaboration across national boundaries. This is for: sharing knowledge and know-how; partnerships and alliances based on common interest, mutual respect and desire to attain social justice, globally and locally; enhancing the sharing of skills, research opportunities; and staff and student development."*

Although much of this momentum has been building over the decades, a newer aim is reached with the current recommendation (from the Cape Town Statement) that a record be kept by all the parties (nations, institutions, individuals, groups, societies, etc.) regarding the extent of exchange, sharing of skills, research opportunities, learner and personnel development, and collaboration across national boundaries. Such an endeavor would be central to provide visibility and build a resource base of who is doing what with whom. The availability of such information has far-reaching implications for both scholars and practitioners interested in advancing international cooperation.

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[5] Source: Walters, S., Mauch, W., Watters, K. & Henschke, J. A. (2001). The Cape Town Statement of the characteristic elements of a lifelong learning higher education institution. Cape Town, South Africa: The University of the Western Cape (published in Adult Education and Development, 56, 109-120). The statement, developed with the aid of considerable discussion at this international gathering with numerous adult educators from twenty-three (23) countries, was undergirded by the background of the UNESCO International Adult Education Conference, held in Hamburg during 1997 (CONFINTEA V Conference, producing the "Declaration on Adult Learning," and the "Agenda for the Future"), the Ad Hoc meeting following up the UNESCO Conference, held at the University of Bombay (Mumbai, India) in April, 1998, producing the "Mumbai Statement on Lifelong Learning, Active Citizenship, and the Reform of Higher Education", developed and made in preparation for the UNESCO World Conference on Higher Education in the 21st century, the Higher Education Conference itself, held in Paris during October, 1998, and by research from both the "first" world and "third" world perspectives.
For further reference see the web site: http://www/uwc.ac.za/dll/conference/ct-statement.htm
For further information contact the co-author henschkej@missouri.edu

International cooperation further manifests itself when all of us (including us as Americans) take learning as a master concept and regard it as a continuous but never complete development, understanding that changes and adaptations in human consciousness occur partly through deliberate action, but even more as a result of the business of living, where learning (which may be intentional or unintentional) includes greater understanding of other people and the world at large.

Such an approach, if based on Jacques Delors'[6] four pillars of learning: being, knowing, doing, and living together, will certainly transform our cooperation, broaden its scope and breadth, and elevate it to heights worthy of the requirements of the new millennium.

Of course, as Budd Hall (Secretary-General of ICAE for decades, currently at the Ontario Institute for Studies in Education) reminds us, violence, crime, arms, and the drug trade have also become globalized.[7] It seems that it would be naïve not to recognize also that with the advent and refinement of communication technologies, crossing borders has been facilitated and can be used for both beneficial and deleterious purposes in the globalization process. We must stay vigilant because of that awareness as we attempt to cultivate the role of adult education, whether as program, process, or movement, and think about and pursue new partnerships in international cooperation in this age of globalization. Perhaps there may even be lessons for us to learn in terms of how such alliances are formed, how they operate, and how they maintain their power.

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[6] Jacques Delors was the chair of the committee commissioned to write the volume that provided a foundation for the UNESCO International Conference on Adult Education (held in Hamburg, Germany, July 1997, the Conference is often referred to as CONFINTEA V). The report was published as: Delors, J. (1998). Learning: The treasure within (Revised edition of the report to UNESCO of the International Commission on Education for the twenty-first century). Paris: UNESCO.

[7] Source: Hall, B. (2001). The politics of globalization. In R. Cervero, A. Wilson et al. Adult education and the struggle for knowledge and power in society. San Francisco: Jossey-Bass.

2. What are the Possible New Partners?

Every institution, group, level of government, corporation, educational organization, health care agency, social service agency, religious body, financial, civic group, service club, informal group, and friends, marginalized social groups, family, etc., are possible new partners in this extremely important enterprise of international cooperation.

Not to be overlooked, however, are the educators and learners who, having been in the teaching/learning transaction for so long, may have become hazy in their conception of cooperation. They may still think of learning as teacher-controlled; competitive and individualistic; cumulative and linear; fitting a metaphor of the 'storehouse of knowledge'; and as an ability that is rare. They may also conceive that any expert can teach; faculty are primarily lecturers; knowledge comes in 'chunks' and 'bits' delivered by teachers; and faculty and students act independently and in isolation. Nevertheless, both educators and learners may instead now be ready for a fresh or refreshed vision and conception of the teaching/learning transaction – namely, that it is a cooperative venture. They may now see learning as the students' responsibility; collaborative and supportive; nesting and interacting of frameworks; fitting a metaphor of 'learning how to ride a bicycle'; and as an ability that is abundant.

They may now conceive that teaching is empowering learning through challenging and complex means; faculty are primarily designers and implementers of adult learning techniques and environments; knowledge is constructed, created and internalized; and, faculty and students work in teams with each other and with other staff. With the fresh vision embraced by these possible new partners – the teachers and learners – they will be the people who can listen to and learn from a full spectrum of humanity, valuing many opinions as worthy of being listened to, honored, and appreciated. They will exemplify and model learning in their everyday life.

They will challenge each learner's intelligence just beyond their present learning abilities. They will expect to treat each other as unique and with respect, take charge of themselves in self-directed learning, engage actively in the process of learning, and seek intellectual challenge. The institutions that support this cooperation will provide adequate learning resources, a work system and an atmosphere that is people-centered, caring, warm, informal, intimate, supportive, and trusting. [8]

Equally meaningful would be partnering between individuals, groups, or nations who are very different, may not share similar cultures or foundations, but who are committed to listening to and learning from each other. They will recognize their mutual resonance and identity with the adult education movement. They will also be willing to work at accepting, respecting, honoring and, when necessary and possible, transcending differences in service of the partnership for international cooperation.

3. Do we Need Global Players in Adult Education?

Kennedy (see footnote 2) suggests that roughly speaking the peoples of the Earth are divided into two types, those in what are called developed regions, which are rich, technology-heavy societies, and those in what are termed developing countries, which are usually much poorer and have great social and economic deficits. In the next 50 years, the richer lands are hardly expected to increase in population at all, whereas the developing regions are expected to grow very rapidly indeed.

The international cooperation that we seek needs global players who have some understanding of this complicated dilemma, and are committed to addressing this situation constructively, and with humility. The importance of having learned from experience comes into play at this juncture. Both authors of this paper have been involved in numerous teaching/learning cooperative ventures in a wide variety of cultures and nations over the years, and have worked with learners from over 75 countries.

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[8] For further information contact the co-author: henschkej@missouri.edu

Insights gleaned from these experiences suggest that it is of utmost importance to be "with" those that represent other cultures and nations. This means that the ground upon which the cooperation is based is level – each party to the cooperation is viewed as having equal standing, worth, and value. Each one's intelligence and stature, although varied, needs to be acknowledged and appreciated. The exchange is for a mutual sharing of resources, in the full knowledge that each will learn from the other, while respecting and expressing gratefulness for this reality. It is especially exhilarating and energizing to realize that while cultural differences exist and are to be admired, learners are learners around the world. Despite the setting, culture, context, or nation, learning is a human, internal process, replete with many similarities, especially in the manner and mode of engaging the adult learner. The light of learning shines from within, and on, all living on this globe.

A key ingredient for global players in international cooperation and new partnerships is the importance of authentic dialogue. Partnerships of this ilk go beyond business-oriented models framed by an economic conceptualization of globalization, where partners share joint interests, profits, and risks, but may not really know or understand each other's way of being. The aim of the new partnerships would be to build international linkages at a deeper level. Accomplishing a deep understanding of the other entails the ability to listen with respect and listen for understanding. It would appear that this is the "substance" of which international cooperation and global players are made. These are the kind of global players the field seems to need.[9]

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[9] For some cogent insights for global players in international cooperation to consider, as well as over 200 strategies and exercises, see Taylor, K.C., Marienau, C. & Fiddler, M. (2000). Developing adult learners: Strategies for teachers and trainers. San Fransisco: Jossey-Bass.

Ma Shuping, President of the Bejing Academy of Educational Sciences, and a deeply committed adult educator, uttered a riveting concept that may bring together this idea of international cooperation in a fresh way. At a 1999 International Symposium on the Theory and Practice of Lifelong Education, Shuping looked at all the adult educators gathered from around the world in the conference hall, and said: *"We are all in the same family – the family of adult educators. We all have the same goals and desires – the well-being of those we serve."*[10] We suggest keeping this framework of commonality and community in mind as we try to revere and understand differences. Keeping autonomy and homonomy in balance seems fundamental.

We, as professionals in adult learning from the United States, with pain and suffering now not unlike those from other countries and cultures (albeit only a glimpse), are ready and desiring to experience the new joy of cooperation with others around the world in this family of adult educators for our mutual benefit – in becoming knowledge-rich; all of us, that is. We are poised to engage in this new – yet long-standing – venture.

Moreover, as representatives of the international aspects of the American Association for Adult and Continuing Education (AAACE), we are ready to lock arms with you to move forward on this important worldwide enterprise – International Cooperation and a New Partnership in this Age of Globalization. We welcome your dialogue.

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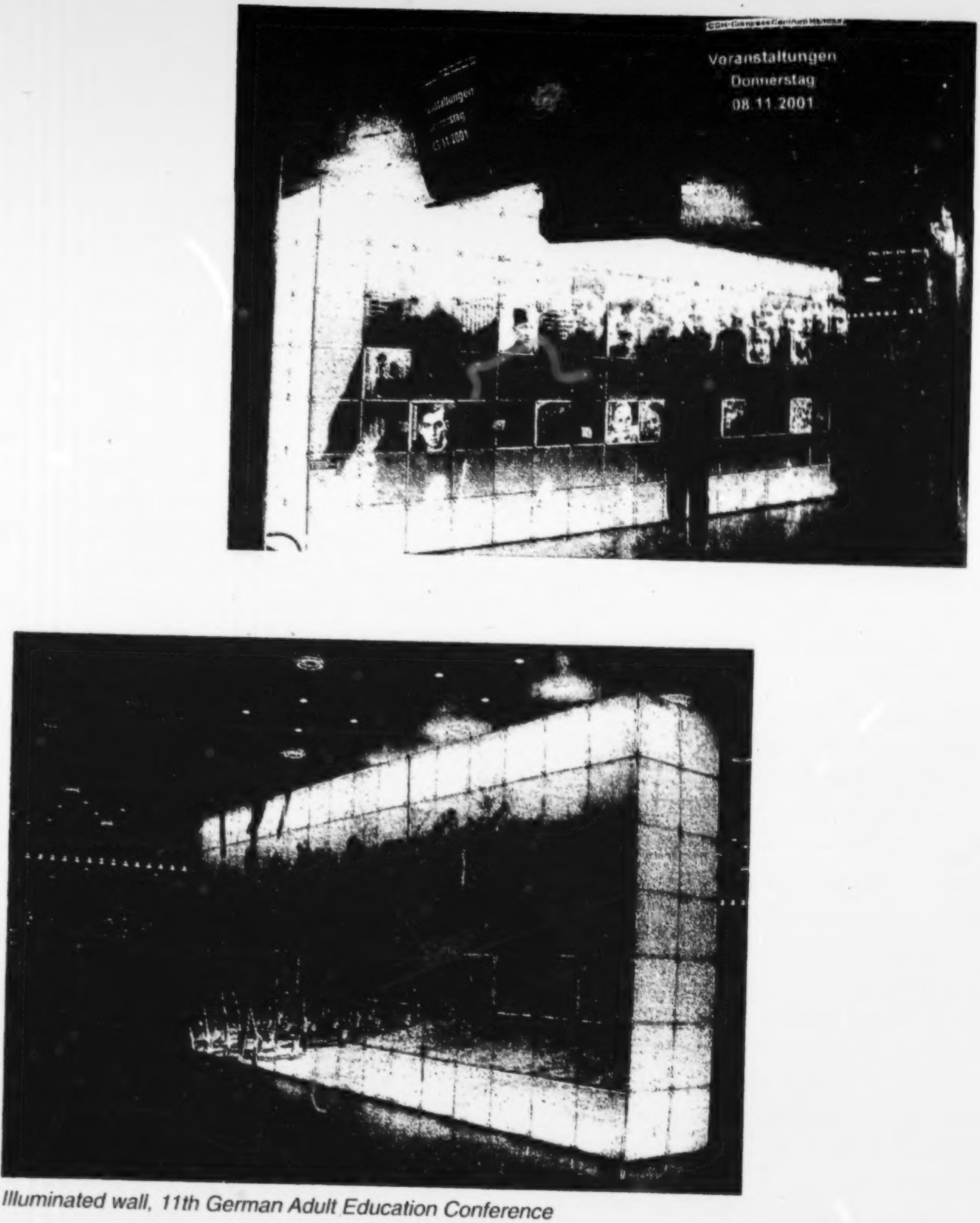
[10] Statement made at the 1999 International Symposium on the Theory and Practice of Lifelong Education, Beijing, China: Beijing Academy of Educational Sciences and Beijing Adult Education Association, where Henschke gave the keynote address.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Illuminated wall, 11th German Adult Education Conference

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Heribert Hinzen

A Forum for Information and Exchange. Impressions from "The Future Needs Learning Needs a Future" Conference

"Thank heaven that's over." This was doubtless what many colleagues thought and felt when the 11th German Adult Education Conference, held in Hamburg from 7 to 9 November 2001, came to an end. The effort of planning, preparing and conducting such a large conference with over 1000 participants in addition to the normal daily workload stretched those involved to the limit. Let me therefore take this opportunity to thank all those concerned for their tireless contributions to its success.

We are generally wise after the event. We think we know what we could have done differently, and better. But perhaps we overlook the factors that caused us to act in one way rather than another at the time. Let me give an example. If we had known when we started planning, a year and more ago, the exact position with regard to two key factors – how much money we could spend, and how many people would attend – many things would have been simpler. But this was not the case. The true figures were not known until afterwards, when all the participants (and especially the paying participants) had come and gone and all the pledges and commitments by sponsors had been taken up.

It will still take some time to assess the outcomes of the Conference, particularly the lessons to be learnt for the future about arrangements in the age of the new media. The 1000 and more people who came were trying to get to over 100 individual sessions – lectures, workshops and discussions – most of which took place concurrently. At the same time there was an education fair, with presentations and exhibitions of books and software. People were on the go all day long. Since the names of those running these sessions promised that they would be of high quality, there was a great deal of interest, and people hurried from event to event. There were frequent complaints from participants that they were missing something. And there were of course also the many informal meetings with old and new professional acquaintances.

Every Five Years...

Eleven Adult Education Conferences have been held, every five years since 1951. The main purpose has always been to raise the profile of adult education and to demonstrate what it provides. The early conferences were small affairs, but they have now become major events held at trade fair grounds or congress centres. The emphasis has naturally varied, but issues relating to professional delivery, organisation and education policy have always been addressed. Politicians make use of the Conference for exchanges of views. The Federal President has given a keynote speech about adult education on each occasion. This Conference was no exception, and we reprint here the address by President Johannes Rau, setting lifelong learning in the context of the information and knowledge-based society.

The Conferences of 1966 (when a development role was first discussed in the context of educational aid) and 1991 (the focus then being on the opening up of Europe and One World) were turning points. On these occasions, domestic concern with the situation of adult education in Germany left room for cross-border and indeed worldwide considerations. It was recognised that it was desirable to learn from one another, which meant adult educators learning from other cultures.

The 2001 Conference was on a different scale, however, as was made plain in the speech by the EU Education Commissioner Viviane Reding, which we reprint here. The Memorandum on Lifelong Learning issued by the EU, itself not a decade old, presents us with a challenge. It sets out guidelines for teaching and education policy that will be of great practical relevance. I can think of no educational document in history that has been subject to such a broad consultation process. Over 10,000 replies have been received from institutions and individuals in

Member States and states applying for membership, from as far away as China, and from associations in the United States with state, civil society and university partners. The Memorandum was of course discussed at the Conference from a wide range of perspectives, regional standpoints, and even languages.

...and this Time?

The Conference title for 2001 was *"The Future Needs Learning Needs a Future"*. The reality and vision implicit in this title was addressed in six broad themes:

- The *VHS* as a Learning Organization
- Learning in International Cooperation
- Learning in Regional Networking
- Learning in the Information and Occupational Society

Folklore Group from South Eastern Europe

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- Learning with Sense and Every Sense
- Learning as a Basic Right – Public Responsibility for Continuing Education

Those concerned with gender issues were catered for equally as well as those wishing to discuss health education, computerized adult education management, adult education in museums or quality management systems.

Prizes were also awarded for the best courses on *"The Internet for Beginners"*, there was a *"Best Practice Exchange"* and a continuing education fair with providers from the *Volkshochschulen* (community adult education centres) themselves as well as from German and foreign educational companies. Platform discussions addressed the financial and political issues facing adult education, and how these might be resolved. There was a huge party for all participants and other guests, with music, dancing and conversation until late in the night.

Learning in International Cooperation

Never before had there been so many foreign participants at a German Adult Education Conference. There had never been so many lectures, working groups and exhibition stands devoted to such a broad range of issues discussing and presenting

- intercultural and global learning
- transnational project cooperation
- European and international plans and partnerships

We at the Institute for International Cooperation of the German Adult Education Association (IIZ/DVV) see this as a welcome and necessary development. But while the phrase *"at a time of globalization"*, which is now so often used, may of course be true, it is surely not an adequate explanation.

Globalization was indeed the key word that haunted and electrified the Conference in various guises, from the slogan *"Local, global, no mat-*

ter" to the frightening question *"Is the South losing touch?"*, which Professor Nuscheler incisively posed in his widely praised speech (reprinted here) that linked in with another theme, *"Global Learning"*, discussed in our last issue. It is all very well setting ourselves the fine-sounding historic task of *"influencing globalization"*, but we then need to think about what forms of international cooperation we want, and what we are actually going to do, and to exchange experiences of *"public-private partnerships"*.

Nearly 25 sessions provided an opportunity to find and exchange information. The breadth of topics, only a few of which can be mentioned here, speaks for itself:

- Agenda 21 – Eight steps towards local government for the future
- Stability through adult education? Projects, partners and perspectives in South-Eastern Europe
- Learning: Lifelong *and* globally?
- Adult education and the eastward expansion of the EU
- International cooperation and new partnerships
- European voices on the EU Memorandum on Lifelong Learning
- Adult education centre practice in the context of globalization
- Education for All and Lifelong Learning

A fuller review of international aspects would have to include the many workshops on intercultural and transnational adult education, and language learning and its certification in the European Year of Languages, taking into account the effects of the policy of enhanced integration and changes in citizenship. This Adult Education Conference will probably have set the course towards greater internationalization in adult education, to which we must respond positively.

Major educational themes were also taken up in discussion of development policy. How can Education for All and Lifelong Learning be related one to the other? It is not just a matter of quantity – a billion people, around 900 million adults are illiterate and 100 million children are not in school – but also of quality. What is basic education, what are the new key skills, and what needs to be borne in mind in teaching them so that they become relevant for Lifelong Learning? What should be the approach to literacy: literacy first and livelihood skills later? The presentation of the main results of the study conducted by the IIZ/DVV on behalf of the World Bank (see the substantial extracts in this issue) suggested some answers, describing the process as *"strengthening livelihoods with literacy"*. What can be done through health education to prevent AIDS and support the sick?

One trend needs serious questioning. This is the uncomfortable polarization between Basic Education for people in the South and Lifelong Learning for those in the North. It became clear in any event that further partnerships must be established in international adult education if the growing number of tasks are successfully to be accomplished. The civil society and NGOs must increasingly be involved alongside state agencies, in both planning and implementation. The thinking that is spreading in the industrialized countries (see the paper by Professors Beaucouvalas and Henschke reprinted here) is of note in this context.

Creating and Using Opportunities

Advantage was also taken of opportunities for further cooperation. The UNESCO Institute for Education in Hamburg and the German Foundation for International Development had invited experts from many countries and continents to a conference in the same week entitled *"The Making of Literate Societies Revisited"*. They had their own agenda, reviewing the state of research, practice and policy on the key issue of how literate, written cultures come about. Many participants were able to make use of the opportunity to attend individual sections of each other's programme that they found of particular interest.

The European Association for the Education of Adults (EAEA) had arranged its Annual General Meeting this year so that it immediately followed the German Adult Education Conference. This meant that all delegates could potentially take advantage of what was on offer at the German Conference. The EAEA and its members, in return, had the opportunity to provide information about their successful projects by means of a large display at the education fair and a catalogue (see the announcement in this issue about how to order it). On the first day of the EAEA Annual General Meeting, which was open to the public, the emphasis was on the presentation and discussion of the best projects and their wider dissemination.

We believe that adult education has much to offer in relation to the Stability Pact for the Balkans and the eastward expansion of the EU. Our partners came from all Central and Eastern European countries, ready and willing to exchange experiences with colleagues from the Volkshochschulen and adult education in other parts of the world. They were frequently in search of specific support and joint long-term arrangements. The presence of many partners from the former socialist states, which are now often described jointly as countries in transition, also made it possible to deal with similarities and differences in education policy and legislation at a special meeting.

For us at the international institute serving the Volkshochschulen, which is engaged daily in detailed cooperation with widely differing partners in many parts of the world, it was also our aim that our partners should make use of their attendance at the Conference to exchange information and see what is being done. We still find that many potential and actual partners know little about the work of the Volkshochschulen, or that their limited knowledge gives a picture that deserves to be improved. Similarly, we had also invited the financial backers of the project, so that they too could find out more about our work and our partners. Representatives came from the Ministry of Economic Cooperation and Development, the Foreign Office, the EU, the World Bank, and also from potential donors who accept the importance of global learning and international cooperation for sustainable development – so that we all have a future.

- Sharing without Barriers
- Learning Product Fair
- Selected Examples of Good Practise from Socrates I

On the occasion of the 11th German Adult Education Conference and the 2001 General Assembly of the European Association for Adult Education (EAEA), the EAEA published a catalogue containing descriptions of successfully completed projects.

The catalogue can be obtained from the IIZ/DVV, Obere Wilhelmstrasse 32 · D-53225 Bonn, Phone: +49 228 975 69-0, Fax: +49 228 975 69-55, e-mail: iiz-dvv@iiz-dvv.de, Internet: www.iiz-dvv.de

XI. Deutscher Volkshochschultag

2001 General Assembly of the European Association
for the Education of Adults (EAEA)

Hamburg, 7 – 9 November 2001
CCH Hamburg

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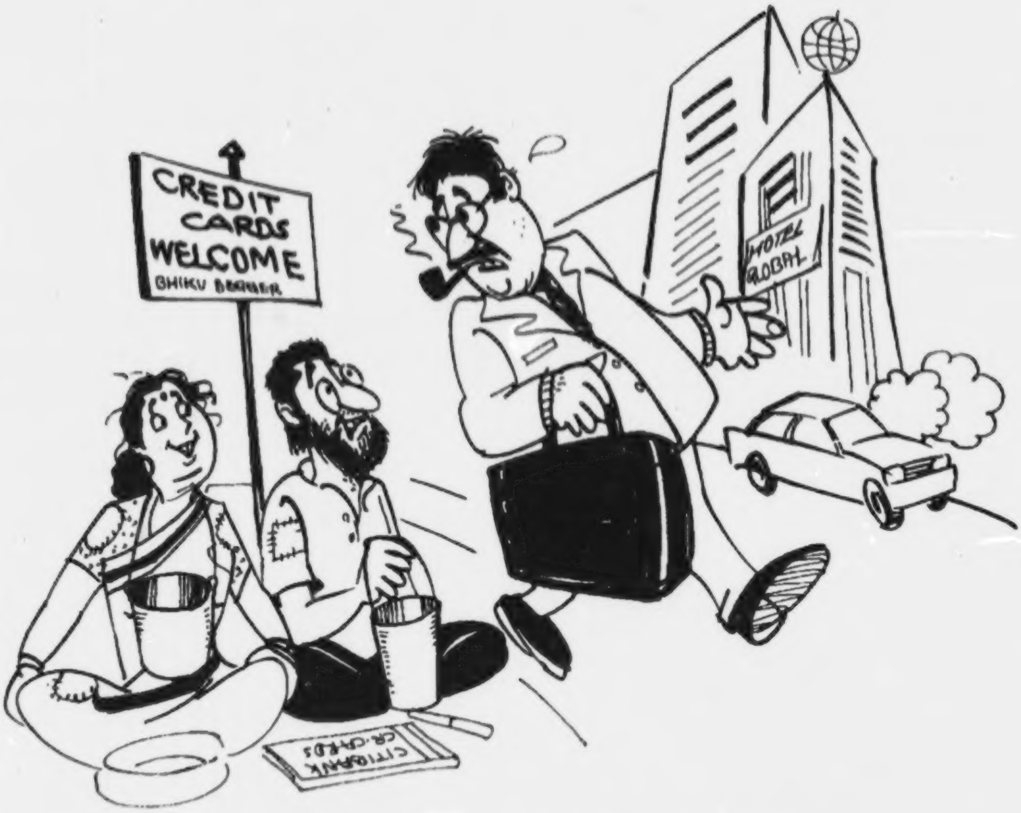
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The Federal Ministry of Economic Cooperation (BMZ), which has been supporting us financially for many years, celebrated its fortieth anniversary last year. We wished to mark that occasion. Prof. Dr Michael Bohnet, Head of Department at BMZ, describes the challenges facing future development policy in the 21st century, in the age of globalization. The text that follows is an extract from the speech which he gave at the "BMZ 40th Anniversary Specialist Conference" on 23 October 2001 in Bonn. His remarks are an expression of his personal opinion. The paper is reprinted from the journal "Kommunikation Global", Volume II, No. 23, November 2001.

Michael Bohnet

Development Policy in the 21st Century: Potential and Options for Action

I.

Every area of applied policy, including development policy in the 21st century, needs a vision. The vision is to extend human rights worldwide, to preserve peace, to reduce poverty and inequality, to prevent famine, to solve the population problem, to combat the causes of refugee migration, and to maintain the natural bases of life. Development policy in the 21st century is an area of strategic policy which cannot be divorced from world domestic policy. It serves the interest of Germany, which pursues peace and security as well as economic, social and environmental goals. The underlying principle is the notion of sustainable development. Development policy implies a collaborative approach to developing countries, involving public development cooperation, trade policy, finance and debt relief policies, and social and environmental policies.

II.

The term "globalization" refers to a process of growing economic and non-economic worldwide interconnectedness. This process is happening at an ever increasing rate. I should like to draw a distinction between five types of globalization: economic globalization, social globalization, ecological globalization, political globalization and cultural globalization. All five elements are closely interwoven, but it is useful to separate them for the purposes of clear-cut analysis.

III.

Since problems are becoming globalized, policies must also become globalized, that is, they must accept global responsibility and adopt global structures which make it possible to act globally. The attempt to meet global challenges is called "global governance". Its role is to devise policies that will minimize the dangers of globalization and maximize its chances of success. Global governance can only make an effective contribution to solving global problems, however, if it works in two areas:

a) measures to strengthen the voice of developing countries within the international system, and
b) support for developing countries at national level to improve living conditions, institutions and the general infrastructure.

These are the major challenges of the future for development policy, which must be realistic and aware of its limitations.

Some of the principal tools of global governance are:

a) developing international norms and sets of values such as social standards, environmental standards, the right to family planning, women's rights, good governance, etc. These have been developed at world conferences, which have acted as a global governance laboratory or learning workshop.
b) helping to frame international accords, such as the WTO and the conventions on the environment.

International norms and accords have become significant building blocks in the architecture of global governance. This architecture sometimes incorporates regional governance, building on key regional players, which already exist at least in outline in all world regions.

The task of global governance is to protect global public goods, including not only the global climate and biodiversity, but also peace, the prevention of severe poverty and economic crises, economic, social and financial stability, and various aspects of human security.

IV.

As a result of globalization, processes and institutions spill over outside the national context, so that there is a lack of democracy at international level. In a democratic vacuum, non-governmental organizations can help to make decision-making more open and transparent, but they cannot guarantee legitimacy on their own. NGOs will only play a role for a limited time, until international legislative and democratic institutions have caught up. This process will take decades. Parliaments will also be better able to monitor the creation of internationally agreed policies if interparliamentary networks are set up and expanded. Global policy networks are also being established, there being between 60 and 70 of these at the present time. Their purpose is to bring together different actors and to build bridges between the public sector, the civil society and the private economy, often in collaboration with international organizations (a classic example is the "World Commission on Dams").

V.

The Relationship of Development Policy to World Economic Policy and International Finance.

International Funds

1. Economic internationalization calls for international taxation. This purpose might be served by the Tobin tax on currency dealings, which would make capital transfers for short-term investment more

expensive in both absolute and relative terms (in comparison with long-term investments). Tax havens and major players in the capital markets are bringing increasing pressure to bear on the OECD countries to reduce the taxation of capital, business and high earners. The resultant international fiscal competition, the beginnings of which were already felt in the 1980s, took a disastrous turn in the '90s according to OECD reports. While the tax burden on businesses and higher-income earners fell, the rates of value added tax and the local levies paid by all citizens tended in the opposite direction. The rate of taxation of wages and salaries grew, while the rate of taxation of profits and capital assets declined. There was a fiscal redistribution of wealth from bottom to top. The Tobin tax could therefore be introduced without impairing the fairness of tax regimes, since the national tax base of each state is continually shrinking, with the result that the least mobile production factor (labour) is bearing an ever increasing proportion of the tax burden (in Europe, the proportion of taxation receipts derived from taxes on capital has declined from 50% in the early 1980s to 35% today).

2. As the financial markets become liberalized, particular attention will have to be paid to the stability of national financial systems, especially in developing countries: to effective fiscal control, a minimum of transparency, and good governance, which includes the ability to regulate undesirable movements of capital. Development cooperation should do more to strengthen the creation and stability of local financial markets and micro funding initiatives.
3. Offshore financial centres (OFCs) are market places which have no quality criteria for the approval of financial businesses, and low or non-existent taxes. The 50 and more OFCs have grown in importance as the movement of capital has become freer. The absence of appropriate regulatory provisions and the disregard for international standards and effective supervision in the OFCs is a constant potential threat to the international financial system. The very scale of the capital invested in and passing through OFCs increases the danger of trouble spreading in case of crisis. Support should therefore be given to the recommendations of the Financial Stability Forum, which include the proposal that OFCs should be subject to checks by a body headed by the IMF so that international regulato-

ry standards can be introduced and an effective supervisory structure created. The OFCs should also be required to report their financial activities to the Bank for International Settlements (BIS). In order to make the proposed sanctions effective, pressure should also be exerted on the so-called non-cooperating OFCs. These include Dominica, Guatemala, Lebanon, the Marshall Islands, Myanmar, Nauru, Nigeria and Niue.

4. Poverty, and especially inequality, can lead to endemic violence. Public development cooperation will therefore concentrate on implementing the Poverty Action Plan 2015. The areas of future German economic cooperation are set out in this Plan and therefore need not be repeated here (they include basic social services: basic education, basic health, family planning including combating AIDS, food and water). The specific emphases for each region are contained in the BMZ regional plans for Asia, Latin America and Africa which have recently been drawn up and published. In the case of Africa, the support given by the G8 to its New African Initiative will be of particular relevance. At its summit meeting in Genoa on 27.07.2001, the G8 agreed to draw up an Action Plan specifying the details of this support before its next meeting in June 2002.

   We shall pay greater attention to the Islamic world in our development cooperation (especially the Maghreb, the Middle East, Nigeria, Afghanistan, Pakistan, Bangladesh, Indonesia and the Philippines). We shall need to bear in mind the difficult situation of India (which has around 150 million Muslims, the second largest Muslim population in the world after Indonesia).

   In revising our country plans and drawing up our strategy papers in consultation with our partners, we shall pay greater attention to the cultural particularities and sensibilities of the Islamic world. In the past three years, these countries received around 30% of our bilateral development cooperation funds, but some selective increases using special funds will be required in 2002.

   Following on from our experiences with the Stability Pact in South-Eastern Europe and the Caucasus, we shall be considering new initiatives in the countries of Central Asia (Uzbekistan, Kazakhstan, Kyrgyzstan, Tajikistan and Turkmenistan), because of the extensive structural problems in those countries (lack of democracy and of will-

ingness to institute reforms). In any event, the strengthening of the rule of law and regional cooperation will remain our main aim.
In essence, our concern is to support viable and democratically legitimate state institutions, and to expand the civil society (by strengthening development policy dialogue via churches, foundations and NGOs).
The emphasis in development policy will shift increasingly from project to programme support. Combined funding and interest support schemes will be expanded, especially for threshold countries. Public-private partnerships (PPPs) will be a strategic tool of development cooperation.

5. Debt relief is linked to so-called poverty reduction strategies, which countries devise for themselves with the involvement of the civil society. As a result of the beneficial effects of these in HIPC countries (debt relief amounting to US $ 70 billion), the gap between the potential for debt relief of this group of countries and that of other heavily indebted developing countries has widened. The total indebtedness of middle-income countries has also risen steadily in recent years. The belief that these would escape from debt by their own efforts has not proved well-founded. Even these countries need further measures to mitigate the problem of debt. The key task will therefore be to develop ways of reducing the indebtedness of middle-income countries too.
6. Because of the protectionist actions taken by the industrialized countries, developing countries are losing about as much in exports as they are gaining in public development cooperation (US $ 50 billion). In the next round of WTO negotiations (the Development Round), the interests of developing countries in all fields must therefore be taken into account, and they will need to play a greater part in WTO institutions. Since the EU agreed in May 2001 at the Brussels LDC Conference to remove duty and quotas from imports of all goods from LDCs into the European market (the "everything but arms" initiative), other industrialized countries – notably Japan, Canada and the United States – have stated their willingness to follow the EU's lead by opening their markets similarly wide. This should raise the income from exports of the poorest developing countries by US $ 3 billion a year.

We have another anniversary to mark in this issue. The UNESCO Institute for Education in Hamburg, with which we have excellent contacts and have frequently worked closely, has been in existence for 50 years. Prof. Dr. Knoll describes the path it has taken. The author, who has frequently supplied contributions to this journal, occupied the Chair of Adult Education and Out-of-School Youth Work at the University of Bochum until his retirement as Professor Emeritus in 1997. For 25 years he was editor of the International Yearbook of Adult Education. He is a member of the IIZ/DVV Advisory Board.

Joachim H. Knoll

From Leisure Education to Lifelong Learning: 50 Years of the UNESCO Institute for Education

The UNESCO Institute for Education in Hamburg is currently looking back on 50 years of existence. Since 1951 it has gained a reputation which has grown with the various changes in the focus of its activities. Its programme has closely paralleled contemporary trends in education and teaching policy, and has reflected the changing international shape of educational research. The title of this short paper perhaps suggests this process of change, from which the UNESCO Institute has emerged as *the* key centre for international comparative research in adult education, its constant purpose being to provide an international bridge between theory and practice. When the Institute was created in 1951, its birth was attended by a guest speaker who still stands for two things in the history of education: firstly, for an internationalist perception of the study and practice of education, and secondly, for teaching which invites the disadvantaged to share in the progress of the world and society, and treats special needs with a deliberate philosophy of "integration". Having Maria Montessori as a godmother has surely meant an enduring obligation to work for those who are at an economic or social disadvantage. This may well explain the Institute's focus on developing countries, and its long-term and sometimes exclusive emphasis on literacy projects and programmes. The stages in its subsequent development have been heavily influenced by its Directors (Merck, Robinsohn, Carelli, Dave, Bélanger, Ouane), who have to varying degrees influenced the profile of the Institute, depending on their lengths of tenure, their natures and their views. At all events, it was clear from the outset that an Institute based in Germany need not necessarily concentrate on German concerns, and the UNESCO Institute has always seen its links with the programme of UNESCO as an intellectual challenge rather than a straitjacket.

The Institute is primarily a unique research institute, concerned essentially with projects with a practical application, but it is in addition a meeting place that was deliberately open to both systems at the time of East-West divisions, and it is a documentation centre with a growing collection, providing an indispensable service to university-based international and comparative educational research in many countries.

It may well have been this varied focus of its work, and the associated publications and practical services, that moved UNESCO to entrust the Institute with arranging the Fifth International Conference on Adult Education (CONFINTEA V), thereby enabling the Institute to increase its reputation as the place for lifelong education research and projects. The impact of the outcomes of the International Conference, held in Hamburg in 1997 (the *Agenda for the Future* and the *Hamburg Declaration*) is by no means exhausted. The theory and practical implementation of lifelong learning have been an almost perennial emphasis, influencing the current day-to-day work of the Institute more or less continuously. The various International Conferences cannot be seen, of course, in isolation from political and macro-economic developments – educational events do not take place in a vacuum, and they have always aimed at resolving conflicts and crises in the real world. The International Conferences preceding that held in Hamburg therefore had their own particular profiles and emphases: Helsingör 1948, Montreal 1960, Tokyo 1972, Paris 1985 and Hamburg 1997. The pattern of 12-year intervals has been maintained, clearly distinguishing the International Conferences on Adult Education from conferences with a shorter periodicity: they are major happenings, serving practice and identifying the tasks ahead for all Member States, regardless of their economic status and political structure.

In the history of the Institute, and in that of UNESCO as a whole, the period when adult education was defined as being more or less coterminous with literacy may be seen as particularly fruitful, since it allowed developing and industrialized countries to share concerns and to look for common approaches to resolving them, albeit with a time-lag between them. Relatively early on, UNESCO moved away from the dream and the hope of being an instrument of cultural harmonization, working towards *one* culture in *one* world. This unrealistic and unsatisfactory vision has now given way to the concept of a multiplicity of peoples sharing a political morality and a spirit of tolerance. This has not meant abandoning every utopian idea, however. The "eradication of illiteracy" is one of the utopian goals that do have some chance of realization, even if not by the short-term deadlines repeatedly proclaimed by UNESCO.

The concepts of adult education, basic education and literacy have been associated with each other ever since the debate sparked off by the Faure Report in the early 1970s (1972), which culminated in the Delors Commission Report at the end of the century (1996/97), and they are in fact linked in many respects through the overarching term "Lifelong Learning". For each of these three focuses of action of the

Institute, it would be possible to name activities, publications and projects devised and pursued by the Institute and its staff either alone or, frequently, in collaboration with others. We have only to think of the follow-up to CONFINTEA V, at which there was already discussion of the concept of Lifelong Learning as a comprehensive term embracing all stages of education and all educational institutions, and of its realization. Literacy itself can be thought of as a major project that has already been running for a long time, continually updated by new strategies and ideas: a series of meetings on it was held at the Institute only last year, including the international conference on "The Making of Literate Societies Revisited". And we may think of basic education as covering more than formalized cultural techniques and including the quest for improved ways of managing one's life and sharing in decision-making with one's fellow citizens. Meetings and publications on environmental education, health education (AIDS/HIV prevention strategies) and civic education may be seen as belonging in this context.

We shall only deal with the organization and structure of the Institute to the extent that they affect Institute projects and programmes. We have already suggested that the profile of the Institute has been influenced by the Directors of the day, as well as by the responsibilities devolved on to it by UNESCO. I regard it as advantageous that the management has been in the hands of non-German experts, with the exception of the early years, because the Institute's location has not in consequence been over-stressed and the benefits of an international orientation have been increased.

At the present time, one of the Institute's activities is the follow-up to the International Conference. This may be connected with the professional interests of the Director, since this task once more focuses on the problems of Africa, the forgotten continent, while the emphasis is ultimately on learning as a practical teaching activity within a lifelong framework. The current Director can also use his knowledge of German to create links with German education policy and to secure funding, much of which comes from the Free and Hanseatic City of Hamburg and the Federal Republic of Germany. Further contributions, and additional tasks, derive from the involvement of other Member States, chiefly the Scandinavian countries and Canada.

The General Conferences of UNESCO have given the Institute an ever more important role in UNESCO education policy, and additional staff were allocated at the time of the International Conference, thereby expanding the Institute's capacity. But it should be admitted that it has not all been roses. The selection of the additional staff was not entrusted to the Institute management, and the process of enlargement appears to have been controlled by strangers in Paris. It was difficult to fit the projects transferred with staff into the overall philosophy of the Institute. But all that is now ancient history. The Institute has since then developed a new plan of activities, setting out areas of priority, and this has given a new motivation to the work and a sense of common purpose.

The programme of the Institute is divided into four relatively open-ended main "clusters", but each individual topic is not forced into some overall plan of operation. In other words, this arrangement has two purposes: on the one hand, to maintain the flexibility of existing and future projects, and on the other, to give the Institute a content-based identity acknowledged by all staff. The four clusters, which are to be regarded as broad areas of research ensuring continuity of subject-matter and staffing, are described as follows:

1. *Learning Throughout Life in Different Cultural Contexts: from Laying Foundations to Strengthening Creative Participation.* This also covers input into major international policy events in the field of education, such as the International Conference on Lifelong Learning in Beijing in July 2001 or the Global Dialogue at EXPO 2000.
2. *CONFINTEA V and Dakar Follow-up.* This covers the follow-up to Hamburg and Dakar in a wider education policy context, i.e., promoting awareness and application of the various outcomes of the conferences, such as the model of a Lifelong Learning Week, which has now been implemented in a variety of systems and is attractive also to systems that are still in the development phase (e.g. Albania, September 2001).

3. *Capacity Building in and for Lifelong Learning.* This concerns individual projects in which UNESCO offers educational support in the broad sense. The projects range from AIDS/HIV prevention to aspects of developing and redeveloping adult education in areas of South-Eastern Europe in transition (e.g. Kosovo).
4. *Structured Advocacy: Networking, Documentation, Communication and Marketing.* Despite the title, this also includes the Institute's own self-evaluation and quality assurance, and it highlights a section of UIE that provides information on a daily basis to all UNESCO regions, a task which only an institute of this scope could handle. The documentation department does not restrict itself to collecting the widely dispersed material that appears about adult and continuing education, but collates it systematically. This means that documentation is recorded using a scheme of keywords, and an annotated bibliography has provided a guide to the jungle of literature on lifelong education/learning ever since 1972.

As was mentioned earlier, it is clear from the Institute's perception of its work that the projects grouped in clusters adopt a midway style that can be described as applied research or research-based practice. Lifelong education is therefore interpreted in concrete terms, just as the utopian visions of Faure and Delors were related to reality. Hence, the UNESCO Institute is not concerned with pure, basic research but is a service agency which also arranges exchanges of staff working in adult education in different regions for a variety of goals.

The three fields of activity, basic education, adult education and literacy, are therefore used initially as a research framework, while the issue of their realization and the practicality of existing models is also addressed. To give an example: the Institute does not stop at defining the categories of formal, non-formal and informal adult education, but also gives illustrative examples, such as details of the non-formal education project in Morocco.

Moreover, project outcomes, associated publications and, above all, "grey materials" are sifted and made accessible. In bald statistical terms, the UIE Documentation Centre contains a vast array of specialist literature. The library has 64,000 books, documents and unpublished items, related to the functions and interests of the Institute. In 2000, 260 journals and newsletters from various adult education and research agencies were stocked, while 8000 sample literacy collections are held as part of a project already mentioned in another context, although it should perhaps be said at this point with reference to literacy that the boundary between out-of-school adult education and schooling for children and young people is fluid and that the materials therefore also cover areas other than traditional adult education.

The Adult Learning Documentation and Information Services (ALADIN) network is being further developed, having brought together adult education establishments, research agencies and documentation centres from around the world since 1989. As a result, it is able to collate data on lifelong learning and lifelong education from all regions, creating a pool of information and making the Institute into a clearing house for adult education.

Mention should naturally also be made of the publications arising out of the Institute's own work.

UNESCO has been at pains from the beginning to achieve a validity for its own publications, and for those produced under its responsibility. This has meant that a practice has grown up in international organizations, and not merely in UNESCO, of citing their own sources. This self-referencing may appear inward-looking, but it has provided universities in particular with an additional source of information and knowledge about education policy. Fruitful cross-referral has become the norm in international comparative research, aided by the increased knowledge of languages among researchers working in this field. Sixty per cent of the documentation held by UIE is in English, which demonstrates both its acceptance as a lingua franca, and the predominance of adult education research from English-speaking countries.

Reference should also be made in this context to the *International Review of Education*, which appears multilingually under the auspices of an international Editorial Board. It has fostered comparative research both in Germany and elsewhere, the first significant conference on the topic being held in 1971 at UIE. The outstanding figures in the discipline (from Bereday to King and Noah/Eckstein) have retained their links with UIE as a result. This continual contact between research, education policy and practice has been expressed not only through participation in conferences and through publications. Personal encounters have always had a place at UIE, a generous host, it may be noted. If research leads to enlightenment not merely through the mind but through both mind and heart, then it must be said of UIE that its work has always combined mental rigour with open-heartedness.

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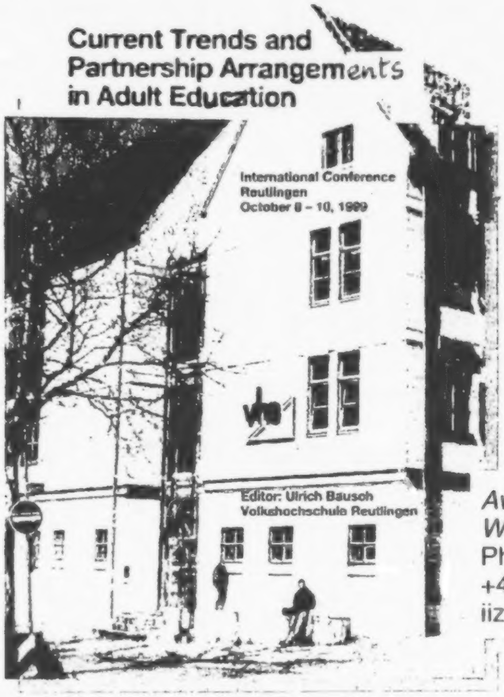

Current Trends and Partnership Arrangements in Adult Education

International Conference
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Editor: Ulrich Bausch
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The first meeting of the High-Level Group on Education for All (EFA) was held in Paris in October 2001. In a rapidly changing world, and particularly in view of the events of 11 September 2001, the participants issued a communiqué calling on all EFA partners to increase their efforts to achieve the goals set in Dakar. They recommend a number of immediate measures as a first step. Further information is available from the UNESCO website: http://www.unesco.org/education/efa/global_co/policy_group/index.shtml

High-Level Group on Education for All

Communiqué from the First Meeting, UNESCO, Paris, 29-30 October 2001

We affirm that no countries seriously committed to Education for All will be thwarted in their achievement of this goal by a lack of resources

1. We, the participants in the first meeting of the High-Level Group on Education for All (EFA), call upon all EFA partners to redouble their efforts to meet the goals and targets of Education for All. The world has changed considerably since the World Education Forum in Dakar in April 2000 and the challenge ahead remains daunting but not insurmountable. The events of 11 September, 2001 have further emphasized the absolute importance of universal basic education of good quality as an essential, if not sufficient, condition for a healthier, more democratic and more tolerant world.

2. We understand and stress the importance of EFA in the context of the other Millenium Development Goals. We recommit ourselves to the six Dakar goals which represent the expanded vision of basic education in the World Declaration on Education for All. In fulfilment of our mandate – to monitor and assess the extent to which progress is being made on the Dakar commitments; to advocate for more extensive and better coordinated action at the international and national levels; and to promote the expansion of resources (financial, human, technical and material) to meet each country's requirements to achieve the Dakar goals – we call upon all partners to move forward in this endeavour, motivated by a greater sense of urgency and supported by accelerated efforts.

Priorities for Action

3. All partners must act decisively on a number of serious issues: the persistent gender and other disparities; the neglect of vulnerable and disadvantaged groups, including individuals with disabilities; the high number of non-literates; the need for understanding and acceptance of diversity; the undermining of education systems and institutions by the HIV/AIDS pandemic; and the critical situation in countries in emergency, crisis, post-conflict and other risk situations. There is an urgent need to define educational quality, its content and outcomes including life-skills education. As a dynamic force in social and economic development, the education of girls and women should receive special attention. EFA must be accelerated in sub-Saharan Africa – with due consideration to the plan entitled the New Partnership for Africa Development – South Asia and the least developed countries, where needs continue to be the greatest.
4. We realize the importance of building on the strength of each partner in the movement, learning from successful experiences, and applying systemic reforms and innovative approaches to the attainment of each Dakar goal, including capacity-building and harnessing new communication and information technologies in the delivery of basic education and teacher training and upgrading. We

emphasize the importance of taking into account individual country contexts.

Partnership

5. We underline the core responsibility of governments for education, and especially to provide free and compulsory quality basic education for all. All partners of the EFA movement should endeavour to coordinate their efforts under the leadership of governments within the framework of cross-sectoral poverty reduction strategies and education sector planning. We encourage governments to establish as broad-based a partnership as possible, in particular to ensure the full inclusion of teachers' organizations, and other non-governmental and civil society organizations in EFA policy formulation, implementation and monitoring. The full participation of local communities is equally important.
6. We appreciate the steps already taken to recognize the role of non-governmental and other civil society organizations in the EFA movement as partners at the global level. EFA partners must, however, play their broker role at the national level in order that the potential of NGOs and local communities can be fully utilized. This includes appropriate capacity-building of NGOs and others to fulfil their role. Furthermore, the private sector needs to be called upon to contribute to the thinking and actions of the EFA movement, and must be adequately represented in relevant forums.
7. We consider it to be vital that our shared efforts be fully coordinated among all partners of the EFA movement. Existing and new initiatives on EFA in the funds and programmes of the United Nations, the World Bank, IMF, bilateral agencies, the Task Force of senior G8 officials on Dakar Follow-up, OECD/DAC and the European Commission, must be well integrated, mutually reinforcing and built on the comparative advantage of each organization.
8. We are encouraged by the partnerships, innovative approaches and potential impact of a range of coordinated activities responding directly to specific Dakar goals and special focus areas, including flagships. Such multi-partner initiatives and programmes

must be carefully synchronized with national priorities, form part of national EFA action plans, be properly coordinated by governments and pay special attention to the educational needs of out-of-school children.

The Global Initiative

9. We need to establish an urgent consensus on all six elements of the global initiative, as described in the Dakar Framework for Action. Each element of the global initiative, individually and collectively, must be supportive of national EFA efforts. EFA is critically important for poverty reduction and sustainable development. EFA goals must be pursued as part and parcel of national poverty reduction strategies, and education plans developed and implemented in the context of macro-economic frameworks and policy reform. Strategic alliances with the World Bank and the International Monetary Fund (IMF) are crucial in this regard.
10. We acknowledge the importance of non-financial constraints to the development of EFA and support the broader understanding of resources, not just as financial, but as human, material and organizational as well. Increased resource mobilization must go hand in hand with effective resource utilization and management by all governments and organizations. Nationally, governments must reinforce national resolve, increase their budget allocations for EFA, address efficiency and capacity constraints, and use international assistance strategically. Internationally, all potential financial sources must be exploited and new creative ways of funding EFA be found, for example through increased South-South collaboration and partnership with the private sector. We continue to be alarmed by the insignificant proportion of overall bilateral and multilateral assistance provided for basic education. The fulfilment of the Dakar commitment also requires a reversal of the decline in overall ODA, particularly for the least developed countries, sub-Saharan Africa and South Asia.

Recommendations

We propose that the following immediate actions be taken:

- Countries must, within poverty reduction strategies, accelerate progress towards sector plans which encompass all EFA goals and take into due consideration both content and process. The plans, which would be the basis for national and international coordinated efforts, must be in place by 2002. They must reflect the gaps – results, capacity, policy and financing (domestic and external) – related to the achievement of EFA goals.
- Building on existing structures, partners at the country level must develop criteria and mechanisms for reviewing and mobilizing resources for the plans. The Dakar resource commitment should be part of all processes to develop Poverty Reduction Strategy Papers (PRSP) and the Heavily Indebted Poor Countries Initiative (HIPC). Many countries will have their plans agreed to and funded, through domestic and external resources, at the country level. Where this is not the case, the World Bank should, where feasible, take the lead in identifying the resource gaps. Where the World Bank cannot do so, the task will be taken forward by the United Nations Agencies. All partners should find new and creative ways to fill the resource gaps.
- A strategy to operationalize the Dakar Framework must be developed by March 2002 by a Task Force constituted by representatives of all partners. The strategy would identify: major actions to be taken within specified time-lines; general roles and responsibilities of partners; linkages among activities, including a clear description of how flagships are integrated into country-level activities; and a consensus on the global initiative. Once the content and scope of a global initiative are agreed, it should be implemented with immediate effect and progress presented to and reviewed by the High-Level Group.
- An authoritative, analytical, annual EFA Monitoring Report should be produced drawing upon national data – quantitative and qualitative – and assessing the extent to which both countries and the international community are meeting their Dakar commitments. As a

matter of urgency, UNESCO should convene key partners to discuss how the report can best be prepared, managed and resourced. The UNESCO Institute for Statistics has an important role in the development of the report.

- Taking into account the experiences of the first meeting of the High-Level Group, we call upon UNESCO to ensure focused and operational discussions and continuity in the important work of the Group.

DECLARATION OF RIGHTS OF ADULTS IN EDUCATION

PARTICIPANTS' BILL OF RIGHTS

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The Declaration of Rights of Adults reprinted below is one of the principal outcomes of the Socrates project "Bill of Rights of Participants in Adult Education". This project was coordinated by FACEPA (Federation of Cultural and Educational Associations for Adults), a Spanish organization which works in the field of culture and education for adults with the aim of overcoming social and educational inequalities by promoting participation. The project was conducted jointly with Belgian and Dutch partners.

Declaration of Rights of Adults in Education

Participants' Bill of Rights

Preamble

Education, an inalienable right of adults, has to serve as an instrument for emancipation, which makes possible the overcoming of social inequalities and power relations.

Education depends on the recognition and the dialogue between different cultures and life styles that coexist in a given community.

By considering as participants all those adults in the course of training, we propose the following Participants' Bill of Rights.

Article one

It is a right of the participants that the states officially recognise and support all the tuition imparted in public centers of adult education and in non-profit non-governmental organizations. We demand from the governments a greater consideration of it in the states' general budgets on an educational basis.

Article two

Collectives liable to social exclusion have to be considered as having priority in all acts of training and social participation. Adult education has to answer the necessities of the community, as well as of those who endure problems of labour insertion.

Article three

Any person has the life-long right to participate in free training processes and to have access and be present in all learning offers directed to achieve all the prevailing qualifications in the educational system of each country. To achieve this, the various public administrations should contribute to the human, material and economic resources needed by the institutions, communities, and people.

Article four

It is a right of the participants to intervene in the educational policies, as well as in the conferences, assemblies, and forums where aspects related to the education of adults and cultural and social participation in general are undertaken.

Article five

The participants have the right to intervene in all local development projects by collaborating with the institutions, associations, and community collectives on improving the quality of life in the social scene.

Article six

Adult education has to be adequate to the interests, motivations, and necessities of the participants. The programmes, methodologies, timetables, human resources, and materials have to be those specific for adult tuition.

Article seven

The definition of the training offer, the design of the educational programmes and their evaluation should be worked on from an egalitarian dialogue between all the participants.

The information about the training offered must be issued using all the channels of communication available in order to be accessible to everyone.

Article eight

All the participants have the right to be part of the organs for internal management of the centres, projects, and educational experiences. This means that the management has to be open and democratic and that the participants will be present as full members.

Article nine

It is a right of the participants to receive an integral and permanent education, which will allow them to cope with the constant changes in society such as transformations in the working world, the access to the new technologies, creative occupation of the spare time, and so on.

Article ten

The education of adults has to reinforce the self-esteem, tolerance, respect for diversity, and changes in society from the development of a critical spirit.

Article eleven

All cultures have to receive the same egalitarian treatment. Adult education has to collect the history and experiences of all the cultures in the community with a view to an intercultural dialogue.

Article twelve

The participants have the right to the recognition of capacities, knowledge, and abilities, which have been acquired from experiences throughout life. The public administrations, together with the participants, have the duty of searching for a formula to recognise and do credit to those aptitudes.

Article thirteen

All adults must receive information about their rights to education.

The participants in adult education want rights that will permit us to have an education adapted to our needs and interests, and defined through consensus.

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DG XII
Adult Education Area
Socrates Programme
Declaration of Rights of Adults in Education

The "Sixth World Assembly of the International Council for Adult Education" was held in Ocho Rios, Jamaica, from 9 to 12 August 2001. The following is a brief extract from the conference report, dealing with the workshops on "Documentation and Training of Adult Educators". Anthony Okech is a long-standing partner of our Institute, and a senior member of the Institute of Adult Continuing Education of Makerere University, Kampala, Uganda.

Anthony Okech

Participation in the ICAE World Assembly: Thematic Workshop on Documentation and on Training of Adult Educators

Each participant had the opportunity to participate in two workshop series of his or her choice. I selected the workshop series on Adult Learning Documentation and Information because the Department of Adult Education and Communication Studies where I belong had expressed the feeling that it was an area in which there was a big gap in Uganda and so needed strengthening. For the second workshop series I had no choice since I had travelled specifically to be one of its resource persons. This was the workshop series on Training the Post-CONFINTEA V Adult Educator.

Adult Learning Documentation and Information

This workshop series focused on the work of the Adult Learning Documentation and Information Network (ALADIN). This network, coordinated by the documentation services of the UNESCO Institute for Education (UIE), was started to address the imbalance between the regions in access to information, to deal with the challenges faced by the centres in some regions and to enable adult educators everywhere to have access to the new opportunities opened up by the advance in technology.

The network coordinator had carried out a survey in 1998, from which she had compiled a Directory of Members. The response had not been as good as expected, and the Directory listed only about 90 centres. This poor response was the first issue considered in the workshop series. The issue of membership was considered, and the workshop discussed whether there should be some kind of formal membership, or an open network should be encouraged so that as many documentation and information centres as possible could network. Although views tended to favour the open network, the usefulness of having a directory of members was recognized. Ways were therefore considered to obtain responses from the documentation and information centres. One proposal considered was to make the questionnaire shorter. It was considered discouragingly long in its present form, although it provided much useful detailed information.

The workshop series also tried to reach a clearer understanding of what is meant by documentation centres. It was recognized that there is a variety of types of documentation and information centres, especially with the advance of new technologies. The workshop also shared a variety of experiences on the way documentation centres are developed and used. Attention eventually focused on the importance of giving a greater role to community-based documentation and information. One implication of this was the need to build local capacity so that people can capture, develop, store and use information. An example was given of how this was being done in Malaysia.

For the way forward, the emphasis was put on the following:

a) Active recognition of the value of grassroots materials and activities and of efforts to document them. (This was included in the Ocho Rios Declaration at the end of the Assembly, see pp. 183.)

b) Training in documentation and library skills to promote setting up of documentation centres in those areas where there is a shortage of centres. (Uganda and Israel particularly pointed out their great need for developing documentation centres.)
c) Resource mobilization to support the setting up of resource centres where they are lacking and to develop the network. Participants from the North mentioned the possibility of mobilizing foundations like Carnegie, Ford or Bill Gates to support the development of a global network.
d) Development of a simple kit that could help those who would like to set up documentation centres.

Training the Post-CONFINTEA V Adult Educator

This workshop series, as already explained in the introduction to this report, was included as a result of concerns raised by Prof. Youngman of the University of Botswana and shared by the DVV. Three resource persons who facilitated the workshop together with Prof. Youngman had their participation financed by the DVV. I was one of them.

The workshop aimed at bringing together participants interested in this theme in order to identify the key issues in developing training for the post-CONFINTEA adult educator, and to propose strategies for future action from an international perspective. The main outcome was expected to be a plan of action for follow-up activities through ICAE, regional organizations and training institutions, and through other modalities such as networking, web-based courses, South-South and South-North exchanges and attachments, cooperative materials production and joint training of trainers.

After a general introduction by the workshop coordinator, the workshop started by sharing experiences on the training of adult educators in the different regions. The examples from Asia (Philippines) and the Caribbean (Dominican Republic) focused on popular education for participatory planning and action. From our experiences in Uganda and Africa I raised the following issues:

- Adult education as a distinct area of specialization – and if so, what is its scope? Recognition or not of adult education as an area of specialization has implications for types of training, the job market, funding and other support.
- Level of training: where should the main focus be – training of front-line workers, first degree or post graduate level? Varying levels of focus in African training institutions have implications for the comparability of the training, staff and student exchanges, sharing of experience, materials development and transferability, and the quality of training.
- Training of adult educators in the context of globalization and liberalization, and the growing need for attention to social justice. There is a need to maintain a delicate balance between adult educators as technocrats and adult educators as crusaders, with implications for support or opposition from the authorities.
- The adult education profession and the challenge of open lifelong learning: is there still room for a specialized group of adult educators? Or what contribution can training in adult education make to the quality of open lifelong learning, which takes place in so many diverse contexts, facilitated by so many varied actors?
- Relevance of the trainers' education: most current adult educator trainers in Africa were trained outside Africa. Relevance also of the training texts used: mainly from North America and Europe. Opportunities for developing the African face of the adult education profession are few. The initiative coordinated by the University of Botswana Department of Adult Education with support from the DVV (Adult Learning Africa website and the African Perspectives on Adult Learning Textbook series) is therefore meeting an important need.

The workshop noted the fragile situation of professionalization and training of adult educators at international level. There has not been much progress over the years. The reference made to it at CONFINTEA V was weak and just a copy of the 1976 statement. Yet already in 1972 the top issue was to enhance and develop the professionalization of adult education. The workshop also noted the strange homes given to adult education in the different universities.

Among the conclusions and recommendations of the workshop were:

a) ICAE to consider the possibility of setting up an international task force to study the situation and determine the need, leading possibly to the setting up of an International Training Institute for the facilitators of adult learning.

b) Advocate for greater recognition of the role and contribution of educators of adults both locally and internationally (recognition of this contribution was included in the Ocho Rios Declaration).

c) Streamline terminologies and avoid unhelpful debates by using terms like educators of adults rather than adult educators, and expertise rather than professionalism.

FISHING IN RIVERS OF SIERRA LEONE
ORAL LITERATURE

***Reprint:** This books, published by People's Educational Association of Sierra Leone (PEA) in Freetown, includes stories and songs, riddles and proverbs, interviews and photographs representing thirteen ethnic groups of Sierra Leone and represent the diversity of cultures.*

Copies can be obtained from:
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C/o PMB 705
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Freetown
Sierra Leone

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An Invitation to be a Partner/Presenter

Lifelong Learning and Social Development

Kerala, India, August 13-15, 2002

The Background. At the gathering in Beijing from July 1-3, 2001, of 250 professionals from 42 nations, a proposal was made to organize a conference on, "Lifelong Learning and Social Development." The state of Kerala in India will provide the venue for the gathering. Kerala also will serve as the background because the performance of Kerala in development is unique. There is a lot to learn from the Kerala example as well as from other success models, grassroots-level activities and contributions of people-centered initiatives.

The goals of the gathering are to stimulate a dialogue and learn about the concept of lifelong learning and social development, to review its practice in different parts of the world in education, health, human services, development, etc. and to identify innovations in policy and best practices in improving the quality of life. In a world dangerously divided by competition, hunger, ignorance and despair, gatherings to share success stories and to build partnerships for people-centered learning and development offer unprecedented challenges and opportunities.

An Invitation. The success of the proposed gathering depends on the involvement of many, the pooling of resources, sharing of experience of practitioners and research findings, broad-level participation and the compilation and dissemination of proceedings, findings and proposed follow-up actions. We invite you to be a partner in this endeavor. Loyola College of Social Sciences and Mitraniketan, two reputed institutions in Kerala have volunteered to co-host the gathering. Individuals who have made the commitment to participate and present at the conference include (as of Jan. 9, 02) professionals from Belgium, Canada, China, Egypt, Japan, Mexico, Norway, S. Africa, UK and USA. We invite you to join this endeavor and enhance its quality and outcome.

Call for presenters. We also invite you to send a one-page proposal for presenting at the conference. Include your name, address, email address and the title and description. Mail proposals to Ms. Cle Anderson, AAACE, 4380 Forbes Blvd., Lanham, MD 20706, USA. Or fax it to her at 301/918-1846 or forward it to discovryjourney@msn.com. Or you may send it to Conference on Lifelong Learning and Social Development, Loyola College of Social Sciences, Trivandrum, Kerala 695017, India.

A study visit organized as a pre-conference learning and professional development activity is scheduled form Aug. 4-18. www.discover-india.com contains information on this study visit as well as the one to China.

To discuss details on various ways to participate, contact Dr. George Palamattam, Chair, International Studies Committee, American Association for Adult and Continuing Education, 2711 Vernon CT, Woodridge, IL 60517, USA. 630/963-5005, discoveryjourney@msn.com

International Council for Adult Education
Conseil International d'Education des Adultes
Consejo Internacional de Educacion de Adultos
المجلس العالمي لتعليم الكبار

The Ocho Rios Declaration

Adult Learning: A Key to Democratic Citizenship and Global Action

We, the participants at the Sixth World Assembly of the International Council for Adult Education, meeting in Ocho Rios, Jamaica between 9th and 12th August, 2001 affirm the vital importance of adult learning.

From the Universal Declaration of Human Rights in 1948 through the Declaration of the International Conference on Adult Education in Hamburg in 1997, to the World Forum on Education for All in Dakar in 2000, an international consensus has been reached on the right to education and the right to learn throughout life for women and men as well as on the central role of adult education in support of creative and democratic citizenship. As the Hamburg Declaration has stated,

> *The informed and effective participation of men and women in every sphere of life is needed if humanity is to survive and meet the challenges of the future.*

We have come to Ocho Rios from all parts of the world dreaming of a new international community of justice, democracy and respect for difference. Yet everywhere we see an economic globalisation that widens the gap between the haves and the have-nots creating needs among the ever-growing number of excluded women and men and also degrading the environment. It shifts the focus of learning from the collective to the individual. This context exacerbates diverse forms of discrimination based on gender, race, disability, class, religion, sexual orientation or personal preferences, age, linguistic and ethnic differences; and discrimination against aboriginal peoples, refugees, migrants and displaced persons.

We have taken notice of the large numbers of people from all corners of the world who in Porto Alegre, Gothenberg, Quebec City, Genoa and elsewhere have expressed their profound concerns about the directions proposed by global financial actors. At the same time we have taken notice of emerging forms of active citizenship and the importance of local and grassroots activities in challenging globalisation.

We are caught in a dilemma between the possibilities of a genuinely democratic and sustainable learning society, and the passivity, poverty, vulnerability and chaos that economic globalisation is creating everywhere. We commit ourselves to working for an equitable world where all forms of discrimination are eliminated and peace is possible.

In this context the International Council for Adult Education together with its regional bodies, national associations and networks needs to support people who have been voiceless in finding their own voice. We are committed to being self-critical in our own practice. To this end we have commitments and proposals for action which begins with ourselves.

Commitments/Proposal for Action

- We will work to ensure that learners, women and men, are present, heard and taken account of in policy-making at the global level.
- We will support the best possible learning opportunities for adults, and the work of those who facilitate learning in a range of contexts,

flexible enough to be shaped by their needs and hopes. We seek a radical improvement in networking opportunities for both.

- We will support initiatives to strengthen popular and democratic decision-making within our own networks and our immediate environment as a contribution to creativity and democratic governance.
- We will also build capacity in advocacy for lifelong learning so that individuals and their communities can realise their potential. To that end we will publish in 2002 a toolkit on how to make the case for and by adult learners.
- We will develop ways to report on how UN agencies, governments, NGOs, enterprises and other actors fulfil the commitments they have made to help adults learn – and in particular we will audit our own work and that of our networks in meeting the commitments made at the UNESCO International Conference on Adult Learning in Hamburg, 1997 and the Dakar World Conference on Education in 2000. In addition, we will map the contribution adult learning makes in social and economic transformation.
- We will publish a report in 2003 on how far the commitments made in the CONFINTEA V Action Plan have been met.
- We support the establishment of an International Observatory on education in prisons.
- We will share and support good practice on adult learning that strengthens sustainable development, equality, justice and the renewal of democratic governance.
- We will help people benefit from each other's experiences by ensuring the best access possible to relevant information through networking and the imaginative use of technologies. We recognise the value of grassroots materials and activities and their efforts to document them.
- We will promote popular education, recognising learners' inherent knowledge and using participatory methods and processes.
- In the light of the Dakar commitment, we will work out the total cost for fulfilment of the Dakar Framework for Action and put pressure on the world community to meet funding needs.
- We will identify the transformative capacities of workspaces and processes as learning sites in the full development of persons, their organisations and their communities.

- We will promote initiatives that foster a synergy between the lifelong learning of health professionals and community-based popular health education programmes, in recognition of urgently needed primary health care reform, and the right of every citizen to health care.
- We will promote the value of informal and non-formal learning for adults to balance the current bias towards formal provision.
- We will review all of our work to ensure that it contests discrimination and marginalisation on the basis of gender, and all other forms of inequality and intolerance.
- We will work to strengthen solidarity with adults denied the right to learn in situations of war, violent conflict, foreign occupation and sanctions.
- We will support initiatives to celebrate adult learning through festivals, Adult Learners Weeks, and the achievement of Education for All National Action Plans.
- We will develop a more active relationship with the media to strengthen its role in education and democratic citizenship.

We call on our partners in governments, multi-lateral and bi-lateral agencies to play their part in supporting us to achieve this programme of work.

We call upon social movements, non-governmental bodies and other civil society formations across the full range of public life and social concerns to work in partnership with us, complementing each other towards the same end.

We call for full support for the UNESCO Institute for Education as the United Nations mandated institution for adult and lifelong learning to hold the international follow-up meeting to Confintea V in 2003.

We are determined to seize the moment to move from words to action.

For more information contact:

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An international conference of Pedagogical Universities in the South Caucasus region was held in Yerevan, Armenia, from 14 to 16 November 2001 under the aegis of UNESCO. The declaration on the outcomes of the conference reprinted below was drawn up by the participants. Information about the participants and the programme is available from the following e-mail address: mf.desprin@unesco.org.

UNESCO

Third International Meeting of the Network of Pedagogical Universities of the South Caucasus Region

(Yerevan, Armenia, 14–16 November, 2001)

We, participants of the Third International Meeting of the 'Prometheus' Pedagogical Universities Network of the South Caucasus held on 14-16 November in Yerevan, within the framework of the "UNESCO Caucasus" project, with participation of representatives of Ministries of Education, professional teaching staff and rectors of Pedagogical and Linguistic Universities of Azerbaijan, Armenia and Georgia, as well as representatives of international organizations and diplomatic missions, and non-governmental organizations, note with satisfaction the progress achieved in the course of cooperation between pedagogical institutions of higher education in the South Caucasus.

Azerbaijan University of Languages, Yerevan State Linguistic University and Tbilisi State Pedagogical University became the principal institutions for the development of the Network .

The decisions taken in Tbilisi (June 2000) and in Baku (May 2001) have been largely implemented.

The exchange of curricula, direct contacts between heads of corresponding University departments, faculties and chairs are being developed. The results of the first Meeting have been summed up in a Bulletin issued in five languages; the second Bulletin is being prepared. The program of collaboration was outlined, in particular in civic education between UNESCO Chairs created in the above-mentioned Universities. The participants of the Meeting take note of the introduction of the course in Georgian Language at the Azerbaijan University of Languages and of the collaboration between the Armenian Language and Literature Chairs of Yerevan State Linguistic University and Tbilisi State Pedagogical University.

At the same time the participants of the Meeting would like to mention that the potential of cooperating institutions is not fully used. Hence the participants of the Meeting set the following tasks as priorities:

- to set up joint working groups on issues of mutual interest, in particular on civic education, on the reforms of pedagogical education, on the development of educational standards and programmes, and on innovations in linguistic education
- to organize joint conferences for students and lecturers, welcoming the involvement of young lecturers in joint activities
- to publish a joint information Bulletin

The participants of the Meeting consider it important to educate the young generation in the spirit of respect for others, openness, tolerance, solidarity, mutual understanding and respect for human rights with due account given to the diversity of educational, legal, cultural and social contexts.

Participants of the Meeting from three states in the South Caucasus consider it necessary to intensify the integration of research activities within the process of developing Pedagogical Universities.

To achieve this goal it is recommended that steps be taken:

- to foster the University departments' scientific and experimental activities, the results of which may become the conceptual basis for the development of Pedagogical Universities in the nearest future with due respect for national principles and regional conditions, and providing for the opportunities of various forms of education.
- to elaborate suggestions on the creation of integrative courses in Pedagogical Universities and the wide implementation of intradiscipline links and modern educational technologies.

Participants of the Meeting confirm the decisions of the previous Meetings, concerning particularly the establishment of regional distant education and a regular information exchange Network, and will make the necessary efforts for their implementation.

Participants of the Meeting specially emphasize the positive collaboration between South Caucasus higher educational institutions and UNESCO, the Council of Europe and other international organizations, and consider it necessary to activate their participation in the programmes on "Education For All", civic education and educational reforms, in the spirit of tolerance, democracy and respect for human rights.

Participants of the Meeting suggest extending the term of Prof. Wachtang Sartania, Rector of Tbilisi State Pedagogical University, as the coordinator of the Network for another year.

Participants of the Meeting express deep gratitude to the Director-General of UNESCO for the support given to the Network of the Pedagogical Universities of the South Caucasus, and express their readiness to support to the noble mission of UNESCO in the course of developing cooperation between our countries.

Participants consider that such meetings make a significant contribution to the development of cooperation between our countries. Hence the fact of holding regular meetings of the kind acquires special interest and importance.

Highly valuing the results of three Meetings held in Baku, Tbilisi and Yerevan, the participants consider it advisable to examine jointly with the National Commissions for UNESCO of Georgia, Armenia and Azerbaijan the possibility of holding the next regional conference of the Network on “Education and Intercultural Communication” in Tbilisi in 2002.

The participants of the Meeting express special gratitude to Yerevan State Linguistic University and UNESCO for their support and successful holding of the conference.

The list of participants and the programme are available at: mf.desprin@unesco.org

ADULT EDUCATION: PROJECT AND COUNTRY REPORTS

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CO-HOSTED BY:
Continuing Education & Outreach,
University of Missouri - St. Louis, and
Missouri Association for Adult,
Continuing and Community Education
(MAACCE)

BLAZING TRAILS TO SUCCESS
2002

The American Association for Adult and Continuing Education

AAACE call for Proposals

51st NATIONAL ADULT AND CONTINUING EDUCATION CONFERENCE
November 20–23, 2002

We need you to be there!
The Theme for the 2002 Conference is:

"Blazing Trails to Success"

With this Call for Proposals, we invite you to offer opportunities for colleagues to learn what you have discovered through your research, experience, or accountability efforts, including the implications of your efforts.

We invite proposals...
that not only include professional, adult, and continuing educators, but also underscore our relationships with partners: Business, government, the community, and others.

Proposals should help further develop the conference theme:

"Blazing Trails To Success"

Selection will favor proposals that are relevant, practical, actively engage participants, and clearly articulate the theme. Proposals should help further develop the Conference Theme by Relating to one of the following Components:

- Distance Learning/Technology
- Multiculturalism/Community Partnerships
- Partnerships with Corporations, Especially: Outsourcing with For-Profit Service
- Partnerships between/among educational Institutions
- Developing Learning Communities

If you have any questions, call John Henschke at (314) 516-5946 or e-mail: henschke@missouri.edu
For more information, call AAACE Program Committee, c/o John A. Henschke, College of Education, 269 Marillac Hall, University of Missouri-St. Louis, 8001 Natural Bridge Road, St. Louis, MO 63121-4499

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The Internet is making new forms of learning possible. An annual "Global Learn Day" has been held for some years. This "Celebration of Distance Education and Technology", held worldwide over a period of 24 hours each year, is attracting more participants every year. Terrence R. Redding describes what it is about. The author is CEO-President and founder of OnLineTraining Inc. in Florida. You can contact him at the following e-mail address: redding@oltraining.com

GLOBAL
LEARN
DAY

Terrence R. Redding

Global Learn Day, a 24-Hour Celebration of Distance Education and Technology

Global Learn Day

(GLD) is a 24-hour, non-stop, live, interactive web-cast that is part global celebration, part conference, part experiment, and part exploration. The purpose of Global Learn Day is to applaud and showcase pathfinders who use new technologies to improve lives in every nook and cranny on the globe. Those who bring you this event are called GLDers, a courageous bunch who all year long answer the call when the mountain is too steep or the chasm too deep.

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How

GLD uses the web, streaming audio and text chat to allow presenters from around the world to share their unique projects and ideas interactively with participants. GLD opens in the South Pacific where the planet begins the new day. After we uncork the champagne in Tonga, Fiji, New Zealand and Guam, our Clipper, The Franklin, takes passengers west through country after country all the way to Hawaii... the long way around.

At each port Harbour Masters lead discussions about both the problems and the opportunities of electronically delivering education from anyplace to anywhere. During Global Learn Day you can learn from, and dialogue with leading educators who are working for affordable and accessible education for all. This interesting and dynamic conference invites those interested in distance education to participate and to share questions and ideas. It is an opportunity to meet and to make interesting friends worldwide. Many have said that this 24-hour conversation has greatly enriched their lives.

Each year the total content of Global Learn Day is archived. This means that all the presentations from each year can be accessed after the end of Global Learn Day, at any time, year after year.

History

In the first year, 78 different countries participated in GLD. Global Learn Day II was a series of smaller excursions experimenting with various formats, technologies, and topics. By GLD III the total number of countries participating exceeded 100 and one author estimated the total number of participants to have exceeded 170,000.

This Year

This year GLD V involved 138 countries and was carried live on public and educational radio stations in the South Pacific, Europe and South America. Except for technical difficulties in Delhi, GLD V would have been carried live on Indian television with an estimated viewing audience of between 4 and 40 million.

Next Year

Global Learn Day VI is expected to involve over 140 countries, reach over 200,000 educators worldwide and have a radio audience in excess of 400,000 and a television audience in India in excess of 100 million (Franklin Institute, 2001).

The Experience

Global Learn Day provides those interested in distance education over the Internet with an opportunity to celebrate education and share their knowledge, and the experiences of others on a global scale. During a GLD conference, you can hear speakers clearly via RealAudio, Media Player, or other forms of streaming audio; view PowerPoint presentation slides or web pages directly on your computer screen; and exchange ideas with other participants and presenters in the Java chat room. You can even pose questions to the presenters through a moderator, and hear the answers shared worldwide via the streaming audio. In some cases, you are also able to see presenters via streaming video.

Over the past five years the author has come to prefer the format of the online conference over physical attendance – you have a more comfortable seat, can often hear and see the content better, and may actually have more access to presenters and other participants. You will miss the face-to-face social interaction, but you will also not be distracted by it. In the 24 hours of GLD, you travel around the world and hear from some of the brightest and most innovative distance educators working today, all from the comfort of your home, using a computer with a simple dialup connection to the Internet. Internet technology is not yet capable of transmitting the sensations of touch and smell, but in many other ways Internet technology is far superior to the more traditional means of participation in educational forums.

Implications

Nor is distance education via the Internet restricted to conferences. The company with which I am associated, Online Training, Inc. (OLT), delivers educational content exclusively through Internet technology to individuals in need of basic education or continuing professional education. (These individuals often do not conform to the expected standards of age, grade, or development.) For example, OLT has been developing and marketing a basic adult education program for the General Educational Development (GED) market. Our enrolment profile shows an almost equal distribution among US students pursuing a GED, students overseas who need to pass the GED in order to qualify for college in the US, and young students ranging from those with learning disabilities to those who are "gifted". Some are home-schooled; others pursue online courses while attending public or private schools. One in particular comes to mind: his speech is difficult to follow, with extended pauses between phrases. In additional classroom, he might not do very well – he communicates too slowly to interact effectively with other students. Online, however, he can take as long as he needs to put his thoughts in writing.

In this respect and others, online education has fewer barriers and presents wider access to potential student populations than do traditional schools. Students who require special accommodations in a traditional setting (and who therefore may be at a disadvantage) may experience things more effectively online. Whatever the disadvantage – age, sight, height, mobility, speech, hearing – it often disappears online. For example, a person either too young to drive or too old to be able to drive to and from class can learn from the comfort of home. A person with limited sight can use screen magnification to increase the size of font until it is readable (a function built into Apple computers and available as an option for Windows), and blind individuals can use text-to-speech software (also built into Apple computers and available as an option in Windows) to gain access to education online. Height or size is not an apparent barrier for most, but for the very short or the very tall, the effect of personal appearances on self-esteem can be a problem in the traditional classroom, but no problem at all online. Issues associated with mobility, speech, and hearing can also be addressed for the student seeking educational opportunities online.

Impact

Eleven years ago at an educational conference, a NASA scientist described the development of a special wheelchair for Stephen Hawkins, a scientist suffering from Lou Gehrig's Disease who can neither walk nor speak. This wheelchair provides Hawkins with access to the Internet and the ability to write manuscripts and generate artificial speech. Last year, I witnessed a presentation by Hawkins, who used the artificial speech from the synthesizer in his chair-mounted notebook computer. He described being able to access the various research telescopes of the world via the Internet. He then spoke on the most recent discoveries by the Hubble Space Telescope and their implications for theoretical astrophysics and humanity's understanding of the universe.

Eleven years ago, there were few that considered the implications of the Internet as a distance education tool. I was not among them. However, Hawkins' wheelchair has allowed one of the greatest minds of our generation access to knowledge and the ability to share his understanding with millions – if not billions – of his fellow human beings. Such a contribution, as well as the potential it represents, cannot be ignored. As the wheelchair is wired for one man, the Internet holds the value of a billion human minds online. The technology that allows one person to share knowledge also has the potential to empower billions of human minds in the same manner. And while courses delivered via the Internet are often devalued as second-rate by traditional faculty and by a public that views distance education as a poor alternative to attending class on campus, courses *without* distance education (DE) components may one day be considered second-rate.

I am reminded of the commercial for the United Negro College Fund that concludes with the sentiment that *"a mind is a terrible thing to waste."* How many minds will be educated at a distance that might otherwise not be educated at all? What contributions might these minds make to the human race? Today, most of the world is not "educated." Access to education, the cost of its distribution, and lack of physical transportation to and from educational sites each presents real problems to both individuals and nations. However, the very foundation of formal education will be affected by the distribution of educational content and ease of communications brought about by the advent of the Internet. There has been a fundamental paradigm shift. The basic cost of distributing information has shifted from the institutions of education to the consumers of education. Today, through the Internet, consumers of education have an increasing opportunity to shop for the knowledge they need. In this environment, maintaining academic quality will become an increasingly important issue.

Conclusion

Formal education requires a firm foundation: a frame of reference, theory, concept, and structure. However, none of these things is static. Formal education requirements change over time, and the pace at which they are changing is increasing. The Internet provides a means by which these structures can be discussed and understood on a global scale.

In *Future Shock* (1970) and *The Third Wave* (1980), Toffler discusses the implications of technological change for humanity. *Future Shock* explores people and groups who are overwhelmed by change; *The Third Wave* offers hope by describing individuals who thrive on change. The first wave of change was associated with agriculture; the second wave was industry-based. The third and current wave is technological – individuals who would ride it successfully must be able to effectively use the Internet. The ability to transfer educational content between any two places in the world via the Internet represents a fundamental change in communications. The ability to gather huge volumes of information from authoritative and current sources is changing the way we conduct inquiries and research. No longer is education tied to an institution's library or bound by the physical limits of a classroom.

No one can predict the outcome of the advent of the Internet as a distance education medium or the potential power it will unleash in humanity. Its impact may well be more profound than the advent of the printing press. Our task as educators should be to ensure that as many people as possible have access to the mind-expanding power of the Internet.

Future Considerations

I know of no better way to celebrate humanity's continuing conquest of knowledge than to encourage people to celebrate learning through the interconnection of the planet during Global Learn Day. The Global Learn Day project offers us a vision of how the Internet can expand our minds and be used in distance education. Global Learn Day occurs Columbus Day weekend each year, and begins with the rising of the sun in Guam, proceeding for nearly 28 hours around the globe and ending with the setting of the sun in Hawaii. Whether you are interested in distance education for yourself or for an organization, consider taking the opportunity to experience it first-hand during a Global Learn Day. GLD is an event every educator, training developer, teacher, instructor, and user of Internet technology should experience.

We are in a period of rapid transition. Today, individuals with access to the Internet use it as a tool to gather huge amounts of information quickly on topics of their choosing. And increasingly, educators and students are using the Internet to enrich learning experiences. The number of institutions offering distance education courses online provides students with tremendous choices, while the quality of educational experiences continues to increase.

GLD serves as an exhibit. It also serves as an experiment. It both showcases current distance education possibilities on the Internet and provides a common global educational experience to people internationally. GLD uses leading-edge technology to web-cast this event via the Internet so that anyone with a current browser, an ordinary computer, and a 14.4 modem can participate. We have the capacity for as many as 100,000 viewers to participate interactively, simultaneously. To date, there has never been an Internet conference with this kind of global audience participation. Who today can say how far-reaching and influential this increase in access will be on individuals and all of humankind?

This year during Global Learn Day V we patched in the scientists at the South Pole, via a link from a ham radio station to a phone bridge into the Internet. We included participants from the University of the South Pacific via PEACE Sat, had a dialog on Globalization with academics in Pakistan, addressed conflict prevention, and conflict resolution with the members of the Bosch Foundation in Stuttgart, Germany, and discussed distance education with solar powered distance educators in Ghana, – all during a 24-hour conference that linked the planet in the celebration of education.

For the first time a public radio station in Dublin, Ireland, interacted live on the air with academics in the USA to discuss the implications associated with lifelong learning and continuing adult education – a new topic in Ireland.

Each year Global Learn Day will attract an increasing number of participants. You are invited to be numbered among them.

For more information on GLD, please visit the Benjamin Franklin Institute of Global Education at http://www.bfranklin.edu

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From 2-8 September 2001 Australia celebrated its seventh annual and the second international Adult Learners' Week. It was a great success. But what is this thing called Adult Learners' Week? Where did it come from? What is its purpose? How did it get to Australia? How is it celebrated? What has been its impact? The ALW movement, on which we have frequently reported in this journal, is receiving increasing support worldwide. In the following paper, Roger K. Morris, of the Faculty of Education, UTS, Australia and Secretary of Adult Learning Australia Inc., reports on experiences with ALW in Australia.

Roger K. Morris

Adult Learners' Week: The Australian Experience

Origins

Over the past 20 or so years the importance of lifelong learning, long promoted by UNESCO, has been increasingly recognised by other international bodies, by governments throughout the world, and more recently by business and industrial enterprises. During this same period, there have been numerous attempts to raise the public profile of, and participation rates in, adult education – long regarded as the "poor cousin" or the "Cinderella" of the educational world.

In this context, an Adult Learners' Week (ALW) was established in the United States of America in the late 1980s. The National Institute of Adult and Continuing Education (NIACE), influenced by the US experience, initiated and coordinated an ALW in the United Kingdom in 1992. It is the shape of this NIACE-inspired week that has influenced the shape of similar weeks in other nations since. This is particularly true of Australia, where the origins of ALW can be directly traced to the UK experience.

Early in 1993, Alan Tuckett, Executive Director of NIACE, visited Australia, where he held extensive discussions with the Australian Association of Adult and Community Education (AAACE), which became, Adult Learning Australia (ALA) in 1999. Later in 1993, the Federal and the State and Territory Ministers for Education and Training endorsed for the first time a national adult and community education policy. This policy initiative had been largely driven by the AAACE, which then approached the Federal Minister for Education, Employment, Training and Youth Affairs to support an Australian ALW. The Minister funded the development by the AAACE of a discussion paper on an Australian ALW. Following extensive consultation, an elaborated proposal was prepared. This proposal led to a grant to the AAACE from the Australian National Training Authority (ANTA) to initiate, coordinate, and conduct a pilot national ALW in 1995.

A national steering committee was established. At the state/territory level, steering committees were also formed. At each level the idea was that there should be a partnership between the government and community providers. Following a favourable evaluation of this first ALW, ANTA agreed to fund the coordination of an ALW on the same basis through the AAACE for another two years, 1996 and 1997. Since that time the funding has continued on largely the same basis.

Organisational Matters

ALW is managed nationally by ALA with the assistance of a National Advisory Committee – half the members of which are drawn from organisations in the adult and community education sector and half from governmental bodies. ALA, founded in 1960, as the Australian Association of Adult Education (AAAE), became in the late 1980s the Australian Association of Adult and Community Education (AAACE), finally adopting its present name, Adult Learning Australia (ALA), in 1999. It is a voluntary association concerned with the promotion of adult education and learning. It has received, since the 1970s, federal government funding to enable it to: act as a national peak body for the field; provide advice to the federal parliament, ministers, and bureaucrats; represent the field nationally and in international forums; and provide information, research, and advisory services to the field. Although nationally led, detailed planning and implementation of ALW are highly decentralised. At the state or territory level, the senior officer of the governmental unit with responsibility for adult and community education convenes, in conjunction with local adult and community education bodies, a state or territory coordinating group. This process, not surprisingly, results in a great deal of variation across the states and territories.

Objectives

In December 1994, the first National Advisory Committtee endorsed an implementation plan which included the following objectives for ALW:

- to celebrate the concept of lifelong learning
- to raise the public profile of adult education and learning
- to encourage more adults to participate in education and learning
- to facilitate networking among providers
- to promote the national training reform agenda

With only minor variations, these objectives have remained current ever since. Though, of course, the emphasis has varied from year to year.

Official Recognition

In addition to the federal government funds provided each year, ALW has received important official recognition. Each of the three Governors-Generals who have held office since 1995 has acted as the patron of ALW. Each year, ALW has been launched, nationally, by the federal Minister for Education, Employment, Training and Youth Affairs. In most states and territories, each year, the week has been launched by the relevant Minister for Education and Training. There has been a formal message from the Prime Minister for each of the ALWs. Both the federal House of Representatives and the Senate have adopted formal resolutions of support, as have many of the state and territory legislatures.

All about fishing (Westcoast Community Centre, Cottesloe, WA) *Photo: Penny Argyle*

Funding

ANTA has allocated about $250,000 each year to ALA to provide national coordination of ALW. The states and territories have spent locally, in total, about another $500,000 each year. Additionally, some small sponsorships and donations have been obtained each year. All in all, a sum somewhat less than $1,000,000 has been spent each year on the activities of ALW. The financial commitments of the states and territories have varied enormously, as do their populations and resources, from almost nothing in the Northern Territory to about $150,000 in Victoria. Of the national expenditure of $250,000, typically 40% has been allocated to staff and related costs, 10% to office expenses; 30% to promotional and advertising charges; 6% to travel; and 4% to evaluation.

International Aspects

An important consideration in the organisation of ALW each year has been the maintenance of relations with other nations, especially those nations which have established similar weeks. The first ALW had six international visitors. Dr Paul Bélanger, then Director of the UNESCO Institute for Education in Hamburg and now President of the International Council for Adult Education (ICAE) was one such visitor. Though the role of each of the international visitors has varied slightly, usually it has involved a series of engagements across Australia, meeting local practitioners, talking to politicians and bureaucrats, and giving media interviews. Each year, there have been about three such visitors. The experience of the Australian ALW was an important input to the Fifth UNESCO Conference on Adult Education in Hamburg in 1997. The Australian example was used, alongside others, in support of the proposition that the Conference recommend that such an annual celebration of adult learning should become an international event for the whole world. This proposition was adopted, and 2000 was the occasion of the first such international ALW.

Promotional Materials

Each year, a range of promotional materials have been produced in conjunction with ALW. Over the years, these have included posters, campaign broadsheets, sample media, releases, a series of briefing notes on significant issues in adult learning, and bookmarks. These materials have been distributed free to participating organisations. Additionally in some years a range of merchandise for sale to participating organisations has been also produced. This has included cards, coffee mugs, stickers, and banners. Users of these materials have agreed that their availability was essential because they provided the wider context for locally organised events. The logo designed for the first ALW in Australia (1995) was adopted and slightly adapted by UNESCO as the Logo for the Fifth International Conference on Adult Education held in Hamburg in 1997. In more recent years, web-based materials have assumed an ever increasing importance in the coordination and promotion of ALW. (www.adultlearnersweek.org)

Awards

Following the lead of the United Kingdom, ALA incorporated a series of awards into the celebration of ALW. These awards have been organised and presented on a state or territory basis. Until this year, there have been no national awards. Usually, there have been four categories in each of the years, though the actual titles of the various awards have varied from year to year and from state to state. The most common categories have been:

Bowled out! (Spencer Institute of TAFE, Port Lincoln, SA) *Photo: Gyn Hyde*

- outstanding adult learner of the year
- outstanding tutor of the year
- outstanding program of the year
- outstanding provider of the year

Some states and territories have a parallel set of awards for Australian Aboriginal learners and their organisations. Currently under consideration are two new categories: outstanding senior adult learner of the year and outstanding learning organisation of the year.

Activities

The activities of each of the weeks has been basically similar from year to year. There is a launch or some sort of opening ceremony. There are award ceremonies. There are conferences, seminars, discussions, and debates. There are open days, learning fairs, displays, presentations, and exhibitions. There are receptions, social events, cultural events, book launches, press conferences and media events. Some of these are at the national level, some are at the state or territory level, and some are at the local level. ALA believes that there have been more than 1000 activities and events associated with each of the seven Australian ALWs.

The Media

Over the years, ALA has tried a number of approaches to the media at all three levels – national, state, and local. Not all these approaches, it must be said, have proved to be successful. In general, this work has been subcontracted out to various media specialists. A number of television promotional messages has been produced and screened as part of television stations' community service obligation. A radio series on adult learning has been produced and made available to public and community radio stations. Press features and newspaper supplements have been written and placed. Press releases have been written for national and local media, and locally relevant stories on learners and providers placed. Radio, television, and newspaper interviews have been arranged for the international ALW visitors.

Evaluation

As part of the conditions of its annual ANTA grant for ALW, ALA has produced and published each year a detailed report on the operation of that year's ALW. Additionally, following the first (1995) and the third (1997) ALWs, substantial independent reports were commissioned by ANTA to provide additional input into the decision as to whether or not the public funding of ALW should be continued. In both cases the decision was taken to continue the funding.There will also be an independent evaluation report written on ALW 2001.

Age doesn't matter! (Devenport Online Access Centre, Tas) Photo: Timothy Smith

ALW has become a significant feature of the adult learning landscape in Australia. And as such it will continue into the future. There will be changes, which is normal and to be expected. But the basic premise of ALW – to raise the public profile of adult learning and to celebrate its benefits to the individual and the society – will remain.

Georgia is one of the countries of the southern Caucasus. Politically it belongs to the Commonwealth of Independent States (CIS), which brings together the successor states to the Soviet Union. It is thus one of the countries in transition engaged on the difficult process of moving towards democracy and a social market economy. Educational reform plays an important part in that process. – Professor Wachtang Sartania is Rector of the Sulchan-Saba Orbeliani State Pedagogical University in Tbilisi. Together with representatives of the Pedagogical Universities in the neighbouring states of Armenia and Azerbaijan, he has set up a network under the inspiring name of Prometheus, in which UNESCO also plays a leading role. Joint projects are discussed and evaluated at regular conferences. Alexander Sannikov, UNESCO Regional Advisor for Europe, acts as the point of contact: mf.desprin@unesco.org – In 2001, the IIZ/DVV opened a new project office in Georgia, headed by Ludmilla Klotz, who can be reached at klotz@iiz-dvv.ge

Wachtang Sartania

A System of Lifelong Learning – Aims and Direction of Reforms in Georgia

Education and science as a whole are closely tied to social and political developments in the country. Scientific and technological advances call for highly qualified specialists who can guide the process of change. The need for specialists is particularly great in innovative fields, while the so-called liberal professions are losing their former ideological profile. The concept of highly skilled employment is changing as a result.

Technical terms such as technology-oriented training are becoming current in many countries. This reflects the importance not only of the general level of education, but also of relevant knowledge of the new technologies. Alongside the expressions “white collar workers” and “blue collar workers”, the new term “gold collar workers “ has come into being. It refers to the training of specialists in new technological fields that reflect the changing requirements of the economy.

The Need for Structural Reforms

The main issue in the 19th century was illiteracy, and the chief aim of education was to overcome it. In the 20th century, universal school education was the principal goal. But the 21st century has begun with the call for a system of Lifelong Learning.

The development of an uninterrupted system of continuing education has become a necessary integral element of a modern society. To neglect it is to place the training of specialists at risk and to debase the skills that are taught.

The task of government is to increase the effectiveness and efficiency of the education system. This calls for sustained reform of all sectors of the education system. Structural reform is seen as one of the long-term goals of reform. Its objectives include the creation of a new relationship between education and the economy.

Current reforms are frequently incapable of solving problems that have built up over time. There is thus a need for fundamental reforms which can lay the groundwork for future developments. These reforms must necessarily be wide-ranging. A key priority is to adapt the new education system to the goal of Lifelong Learning, which is not solely concerned with the adult phase of life.

The provision of ongoing continuing education is nonetheless crucial if individuals’ skills and knowledge are not to be devalued in the face of the social changes brought about by scientific and technological progress. This process has happened largely spontaneously so far in Georgia, chiefly through individually organized self-training and vocational continuing education. The system of uninterrupted education now needs to take on an organized form.

International Influences

The concept of uninterrupted education has now gained general acceptance, largely through the active involvement of UNESCO, other UN agencies such as the ILO, and other institutions concerned more generally with the organization of employment, science and education in various countries. Lifelong Education is the only really profound new idea, and it requires thought and analysis, especially if it is to be developed into a system.

In response to the demands of the economy, the main elements of a system of uninterrupted education are the initial training of specialists at all levels through school, vocational and higher education, and their subsequent continuing vocational education. These should be available universally to all. Otherwise, there is no question of achieving the reforms.

Systems of school education are currently being reformed in all post-communist countries. It is noticeable, however, that higher education institutions are still paying far too little attention to the continuing training and retraining of their graduates.

The universities can be the academic centres that will provide the theoretical basis for further reforms. This was the view already taken by the Commission on Education for the 21st Century set up by UNESCO under the leadership of the former President of the EU Commission, Jacques Delors.

Implementation of Reforms

This necessary reform of education and training is also called for by civil society institutions, including NGOs, and is indeed urgently requested by the donor community. In the latter case it is understandable that state educational institutions are still identified with the practices current during the period of the command economy.

It should be recognised, however, that some reforms were carried out once Georgia regained its independence in 1990. In higher education, the situation changed: institutions were freed from the pressure of state political ideology and gained the right to be independent. This enabled the higher education system to reorganize in response to the demands of the market.

It is becoming increasingly clear that the important tasks of educational policy development, administration, initial and continuing education, and research, can only be accomplished if the state, the civil society and the universities work together.

We regard the following steps as necessary in order to resolve existing problems:

- A common policy on education needs to be developed, together with an overall plan for the entire education system.
- Particular attention needs to be given to the area of vocational and higher education, in addition to general school education.
- The necessary legislative basis for the entire education sector should be further developed.
- Attention should be given to the rehabilitation of the Pedagogical Universities, and financial support given.
- Education is the most important sphere for investment by the state and international organizations.
- Active teaching methods should be introduced more widely in higher education.
- Vocational guidance, education planning and division of human resources are of importance to the state.
- Educational standards, examinations and marking systems need to be devised for all levels of education, for both schools and higher education. The state should take a lead in this.

These steps would make a real contribution to a policy of equality and democratization The state has a coordinating role in accomplishing this mission. Significant progress would be made towards the creation of an attractive educational environment, which is a prerequisite if people are to be willing to pursue Lifelong Learning.

The Role of Higher Education

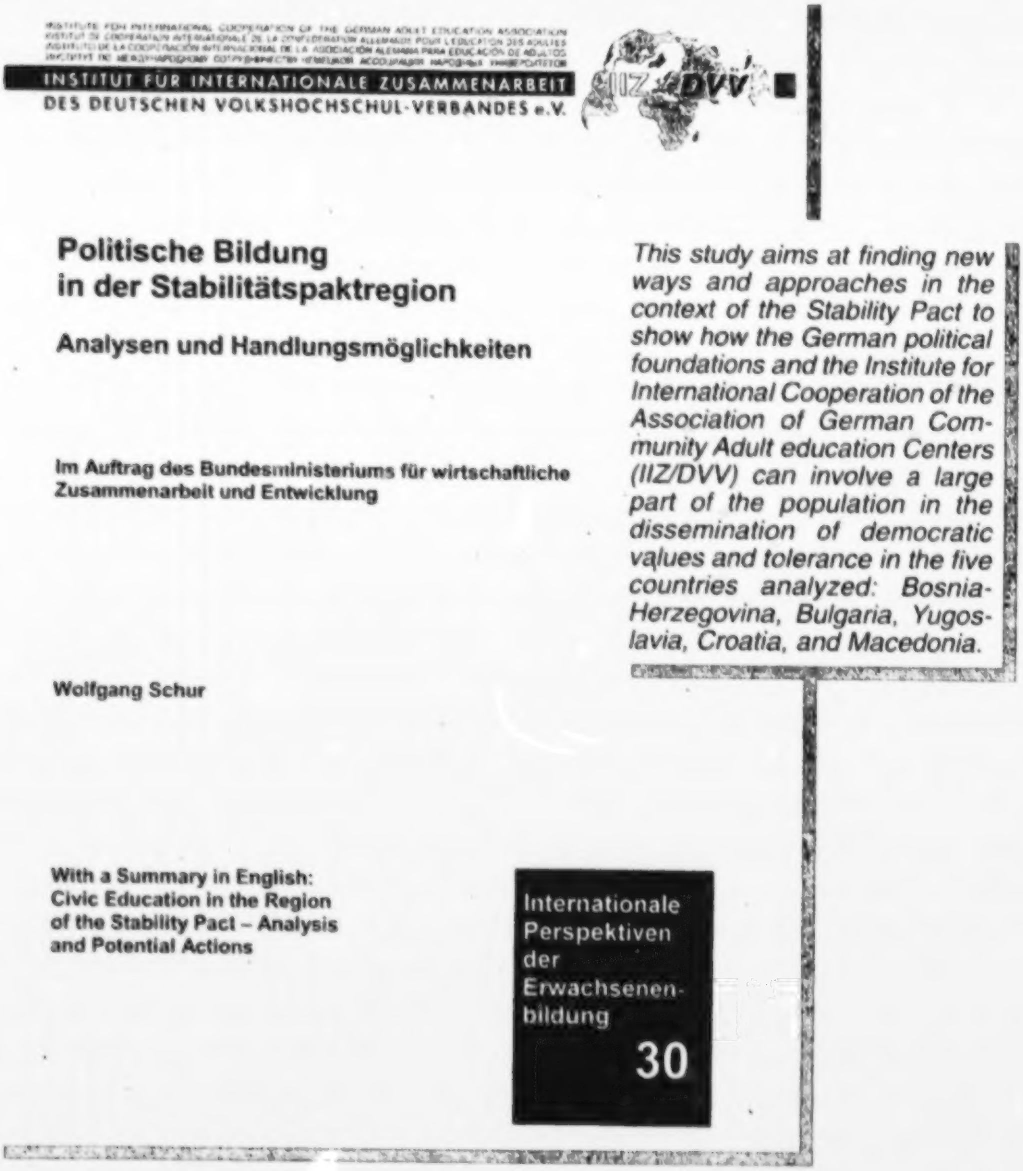
In comparison with the newly founded private universities, the older state institutions still possess in my opinion a better material and technical basis, and greater academic weight in teaching. Their new-found independence gives universities the chance to expand academic education. They must play their part in delivering continuing education and retraining for their graduates.

In our view, higher education establishments should play a competitive part as the institutional basis of a system of uninterrupted education expands. International organizations and donor countries supporting educational reform in post-communist countries should direct their efforts towards the state universities, which are trusted by the population.

The universities should thus become major centres for the training of specialists. They can offer the facilities for uninterrupted education, enabling specialists to update their vocational skills in response to the requirements of ongoing challenges and innovations.

The universities can act as main partners in the field of international cooperation, through student exchanges, research on course content, and the establishment of institutes operating at an international level. The Sulchan-Saba Orbeliani State Pedagogical University is willing to do so, and places great hopes in future collaboration with the Institute for International Cooperation of the DVV in the Caucasus.

The universities should in addition fulfil their primary intellectual and social mission, which includes the propagation of universal values and the preservation of the cultural inheritance.



INSTITUT FÜR INTERNATIONALE ZUSAMMENARBEIT
DES DEUTSCHEN VOLKSHOCHSCHUL-VERBANDES e.V.

IIZ DVV

Politische Bildung in der Stabilitätspaktregion

Analysen und Handlungsmöglichkeiten

Im Auftrag des Bundesministeriums für wirtschaftliche Zusammenarbeit und Entwicklung

Wolfgang Schur

With a Summary in English:
Civic Education in the Region of the Stability Pact – Analysis and Potential Actions

Internationale
Perspektiven
der
Erwachsenenbildung
30

This study aims at finding new ways and approaches in the context of the Stability Pact to show how the German political foundations and the Institute for International Cooperation of the Association of German Community Adult education Centers (IIZ/DVV) can involve a large part of the population in the dissemination of democratic values and tolerance in the five countries analyzed: Bosnia-Herzegovina, Bulgaria, Yugoslavia, Croatia, and Macedonia.

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Society in Fiji is facing huge changes, especially in the socio-economic, cultural and political arena. Non-formal education has a particular role to play in helping people to deal with these challenges, in compensating for deficiencies in the formal education system, in the field of intercultural education, in lifelong learning, in combating poverty, etc. The author, Dr Akanisi Kedrayate, is Head of the Department of Education and Psychology, School of Humanities, University of the South Pacific.

Akanisi Kedrayate

Education for Nation Building: The Contribution of Non-Formal Education in Fiji

Introduction

Education is an infinite process that knows no barriers, age, creed, colour or race. For any society, be it simple or complex, the transmitting of knowledge, skills and attitudes to the young is an important activity for the sustainability of community living. Adult members of the society also continue to learn through various rituals, ceremonies and activities. This learning can be delivered informally, non-formally or formally. Broadly conceived, non-formal education (NFE) is not a new concept but an educative phenomenon integrally incorporated in even preliterate societies. Increasing evidence exists to substantiate the claim that non-formal education is an old concept with a new name.

Non-Formal Education in the Traditional Context

Non-formal education was practised in Fiji before the advent of schooling. Young people learned the knowledge and skills for economic and social survival in a highly organised fashion with recognised and experienced adult members of the community as teachers. Learning was community-based and was through observation, imitation and on-the-job-experience. Adults also continued to learn through participation and sharing in community activities and ceremonies. Although the content, method and direction of what was learned was limited and confined, it was relevant to their way of life, the resources available and their ability to meet extended family and community needs. Learning was community-based and it was an important process, as it ensured continuity and sustainability of community life.

In the early days of Christianity, there was also much non-formal education in literacy, agriculture, and home economics and hygiene. When such classes were replaced by formal education, these traditional forms of organised and structured learning were no longer emphasized and valued although they continue to influence cultural and social life in the rural communities. Formal education was valued more and seen as prestigious as it paved the way to 'white-collar jobs' mainly in the modern sectors of society.

We have to acknowledge that formal education has contributed and will continue to play an important role in the preparation of literate and educated human resources for the modern economy. However, we also have to accept the reality that there is a mismatch between the output of the formal education system, the aspirations of school leavers and paid employment opportunities. A significant number of young people are excluded from formal education or the formal sector of employment.

Rationale for Non-Formal Education

In the 1970s NFE was first perceived to fulfil two roles. First, it was a 'second chance education' for those who had dropped out from the school system. The government established multi-craft programmes to enable school leavers to be trained and acquire self-employment skills to generate their livelihood. While there were some success stories, to a large extent the programmes were unsuccessful as parents perceived the programme to be second rate. They preferred their children to be academically educated for 'white-collar' jobs in the formal sector.

Secondly, in addition to the needs of school drop-outs rapid technical and social changes demanded continuing education and re-training in different knowledge and skills for those in modern employment as well as in the rural community.

While there has been a general concentration of educational resources on formal education, a recognition of the need for access to new skills and knowledge by those who are no longer in school has led to the establishment of a number of education and training programmes for adults by both governmental and non-governmental agencies.

There is now a greater awareness and acknowledgement of the need for non-formal education in Fiji and other Pacific Island nations and the role it has to play in nation building.

According to the Education Commission Report (Government of Fiji, 2000) an estimated 14,000 young people enter the labour market every year, but only about 8,000 of them find jobs or further training. Many young people both in the urban and rural areas need openings to develop skills to enable them to earn their living.

Purposes of Non-Formal Education

NFE can fulfill a range of educational purposes. One purpose is in relation to the formal education system. Due to the inadequacies of the formal system to provide skills, knowledge and attitudes at an acceptable cost, NFE is seen as a cheaper alternative means to provide individuals with skills required by the economic system whenever the formal system has failed to do this. The related problems of school leavers and unemployment have led to the expansion of NFE training programmes. However, the purpose of NFE education is not confined to the development of skills for employment as it is broader in scope and more extensive in coverage.

Non-formal education has also been used for remedial purposes, where the formal system has been unable satisfactorily to educate all its citizens, and where illiteracy is a problem. For example, in the Asia-Pacific Region, NFE is used to support the universalisation of primary education (UPE) and literacy programmes and has been used to help children to complete primary education.

But serious as the literacy problem is in many countries in the Region, NFE is not confined to creating a literate population or maintaining a level of literacy. The need to ensure that neo-literates do not lapse into illiteracy has led to non-formal education being used for functional literacy to enhance skills and competence in job-related activities.

Non-formal education is also perceived to meet the needs of rural people. NFE may offer the opportunity to learn productive skills and a way to participate effectively in the development of society. When combined with other inputs, rural NFE is a strong accelerating factor in economic and social development in rural areas.

Another purpose of NFE is as a means to achieve the goal of lifelong education. The concept of lifelong education is best realised through NFE, as it provides better possibilities to fulfil people's needs than formal education.

Through NFE everyone is perceived as having the opportunity for purposeful learning to keep abreast of technical, social, cultural, economic and political changes, and not only to fulfil their role in society but also for self-fulfilment and self-development throughout their life span.

Whether the purpose of NFE is 'social maintenance' or 'social change' depends on the objectives and strategies of non-formal education and the way facilitators and learners perceive themselves either as active members of a changing society or as 'helpless products' of an established system. It is argued that non-formal education cannot be neutral and that in terms of its purpose, it is used either to maintain society or to change it.

Non-Formal Education Provision in Fiji

Non-formal education programmes are offered in both rural and urban sectors by both governmental and non-governmental organisations. There are 16 government ministries offering NFE programmes which include agricultural extension, micro-finance, small business development, workers' education, co-operative education and youth programmes. Some programmes are aimed at raising peoples' awareness, and these are occupational health and safety, consumer education, police-community outreach, public health education and community support for schools.

Non-governmental organisations (NGOs) such as the YMCA and YWCA, FCOSS, church organisations, etc., are involved in a multiplicity of programmes, which include community development, environmental education, vocational education, human rights, women's issues, public health, business skills and computer literacy.

These programmes have a diversity of aims and objectives. Some aim to generate community education as a way for information to reach the rural sectors, while others aim to promote self-reliance through income-generating ventures or to enhance human welfare by providing for personality development and satisfaction in living. The specific aim of some programmes arises from a concern for village communities, and particularly young people, and is to assist them to find employment by utilising existing resources and skills. As can be ascertained from this information, there are already existing programmes and projects that address the various learning needs in our society.

Non-Formal Education Policy

Although NFE was officially recognised as a major educational priority and national strategy for development in the 1990s, there was no official policy. A National Steering Committee was appointed in 1996, but met infrequently. With the assistance of the UNDP Regional Programme on NFE, workshops were held in late 1999 and in April 2000 to formulate a plan for non-formal education policy. (Government of Fiji, 2000). The focus of the new policy is on 'education for development'. The overall aim of the policy is to offer programmes that will:

a) make an effective contribution to poverty alleviation by enhancing the economic well-being of the population,
b) foster the emergence of a sustainable future, especially for those who might not be able to find employment in the formal sector,
c) develop in all citizens a regard for social justice, gender equity and equality for all,
d) promote healthy lifestyles among the population through courses in health and physical education,
e) strengthen the cultural roots of the society by offering programmes in local music, dancing, other art forms and sports,
f) foster the development of a positive perspective and an increased understanding among the population of national and regional as well as global/international issues (Report of the Fiji Islands Education Commission/Panel, 2000).

While the policy is yet to be ratified by the new government, the Ministry of Youth, Employment Opportunities and Sports (the initiating Ministry) is implementing some proposed initiatives.

NFE in a Multi-Racial Fiji

In Fiji, like many Pacific countries, cultural, economic, political and social relationships have undergone extensive transformation. Fiji is a multicultural society and consists of various racial groups. These groups have values, attitudes and motivations which have to be understood and considered in non-formal education programme planning for work with these different groups and the nation as a whole.

Even within groups there are differences. In the Indigenous Fijian group, for example, there are religious differences between the Seventh Day Adventists and Methodists which have to be considered in NFE programmes. Cultural sensitivity is important, especially in a multicultural society like Fiji.

223

If non-formal education programmes are to be relevant to the various cultural groups, it is critical that activities are congruent with the participants' way of life. Equally important is a general understanding of the structure and way of life of the various races so as to enable a better understanding of each other's cultures and values. The coups of 1987 and 2000 instigated suspicion, hatred and intolerance among the people, particularly between the Indigenous Fijians and Indo-Fijians. The perception of nationalism, ethnicity and religious supremacy has created tensions and encouraged conflicts and divisions. It is therefore important that non-formal education programmes are sensitive to the effects of the coups and the issues which cause tension, and that steps are taken to encourage the facilitation of activities which foster greater cultural and multi-cultural understanding and tolerance. The school could be used as a centre within the community where cultural and educational activities are encouraged and facilitated not only for children but also for adults. NFE programmes may be organised not only for the two major groups but also for inter-groups.

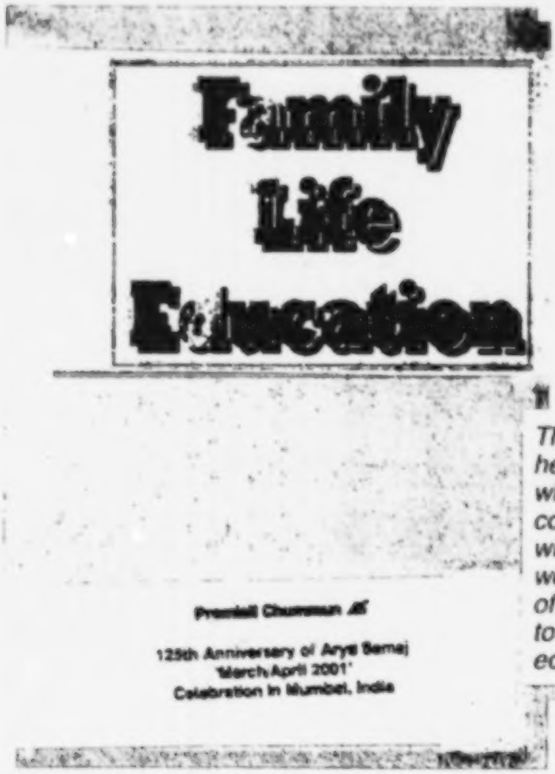
Recent changes in economic policy and strategy in Fiji demand training in various skills. It is both in urban and in rural areas, where the majority of the people live, that skills training is needed. The need for skills training activities that are relevant to these communities demands a base which is accessible and has facilities and resources. In this respect, the school offers the potential not only in terms of facilities and resources but it also can facilitate and co-ordinate between various agencies and the community in terms of time, resources and needs. Policies determined at the macro level affect the lives of the people at the micro level. Understanding these issues as well as the values, attitudes, motivations and aspirations of the various racial groups is considered essential in non-formal education programmes.

Fiji is experiencing socio-economic, cultural and political changes. The education system needs to deal with these changes for the nation as a whole and the groups within its multi-racial context. NFE has a role to contribute to these changes.

Conclusion

While there are existing NFE programmes and activities in Fiji, it is evident that the current provision is inadequate to meet the learning needs of all the people in the country. Policy recommendations have been formulated and are awaiting ratification by government. Hopefully the government will endorse and provide appropriate resources for their implementation. The gospel of non-formal education can continue to spread and be acted upon if enlightened and committed individuals are ready to respond to the needs of the community and the nation.

To build a better Fiji, educators have an important task of responding not only to the learning needs of children but also to those of adults in the community through non-formal education.



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This article describes a popular education initiative being utilized by Kondh adivasis (original dwellers) and a partner adivasi NGO in the state of Orissa, India, to improve Kondh prospects for subsistence food production and land security. Dip Kapoor is Adjunct Associate Professor in Educational Policy Studies at the University of Alberta, Edmonton, Canada and President of HELP, a Canadian voluntary development NGO, while Kumar Prasant is President of VICALP, a local adivasi NGO in Berhampur, Orissa, India.

Dip Kapoor/ Kumar Prasant

Popular Education and Improved Material and Cultural Prospects for Kondh Adivasis in India

Introduction

The Kondh adivasis are one of India's 427 Constitutionally recognized "scheduled tribes" who constitute roughly 8% (88 million) of the Indian population. Numbering over one and a quarter million people (the largest of at least 62 tribal groups in the east coast state of Orissa), the Kondhs are located in the hilly region and valleys of the eastern ghats, spread across seven districts with the largest concentration in Phulbani district. Relatively new to settled cultivation, the Kondhs are primarily hunter-gatherers that have been, according to sketchy historical/anthropological accounts, pushed deeper into the forested regions since 4000 BC through successive waves of marginalization and exploitation at the hands of various "invaders", including Dravidians, Aryans, the British, the Oriyas and the administrative agents of an independent Indian state.

In 1994, a small group of ten adivasi people registered a local voluntary development non-governmental organization (NGO) by the name of VICALP (or "alternative" in Oriya). With some formal schooling and, in some cases, holding university degrees, these individuals had all worked for large NGOs (international and national) and felt the need to develop an "alternative" to the existing approaches to dealing with poverty and marginalization of adivasis in their region. Having built relationships with various partner Kondh adivasi villages over the years, largely through critical adult education, organization building and activism aimed at resource mobilization from the state, VICALP was in a position to establish a more tangible partnership with 30 villages in 1997 with the help of some external support and people's contributions from the partner villages.

Popular Education and Critical Dialogue on Destructive Development

Adult popular education is the cornerstone of the approach adopted to social change, as VICALP addresses the psycho-social barriers and material concerns associated with adivasi marginalization, simultaneously. VICALP has chosen to get "tangibly involved" with only those communities that have gradually accepted the need to wean themselves off the "charity approach" to development and social change (i.e., communities that remain in "permanent emergency relief mode", waiting for aid agencies to provide material aid until funds run out, at which point the dependent community simply waits for the next "cargo ship"), opting instead for a critically informed organized activism concerned with control over resources, social-cultural justice and autonomy for the adivasis. VICALP's hope is to build a non-violent social movement of adivasi "constructive resistance" to state-corporate led "destructive development" that has challenged their ability to co-exist

227

as indigenous cultures. The hope is to enhance the current and long-term material and cultural prospects for the Kondh adivasis (and other social groups who might join the struggle) within the political context of the Indian union, by utilizing popular democratic activism to activate existing policies and constitutional guarantees (or agitate for legal/policy reform when necessary) pertaining to tribes, as understood in terms of the adivasi existence-rationality.

Inspired by Brazilian educator Paulo Freire, popular education as understood and applied by VICALP has meant an education that galvanizes Kondhs to actively address a historical process of marginalization through the development of critical awareness of the social structural constraints that contribute towards their marginalization. More importantly, popular education encourages Kondhs to recognize their role as agents and subjects who can resist, reform and/or mold these constraints to address their own interests and their cultural and material survival as adivasis. VICALP and the Kondhs engage in a democratic dialogue on issues that emerge from their experience of exploitation with a view to uncovering the social structural contribution towards problems of poverty, cultural marginalization, gender discrimination and casteism, while simultaneously considering the idea that if such structures are imposed by those in power, they can be challenged through resistance and conscious activism aimed at reversing power and domination. Organization and strategic action to address this possibility are integral to the process of democratization encouraged by such popular interventions.

Critical dialogue between VICALP and the Kondhs has made it abundantly clear that Kondh concerns are predominantly tied to questions of land/forest related insecurity. As forest-dwellers, the Kondhs rely on the forests and the land for their subsistence and their cultural survival as a people (their aranya sanskriti or forest culture: they became cultivators over the last century out of necessity – a change that is still accepted with some degree of "guilt", given that cultivation is viewed as a violation of the earth deity/mother goddess). Consequently, critical dialogue between VICALP's popular educators and the Kondh communities often centers on national development and land/forest related issues.

While Kondhs recant their history of displacement through stories recited by their elders, punctuated with details of recent displacements/evictions narrated by adults who have had to deal with the lower cadre of the state bureaucracy on a regular basis, VICALP's popular educators attempt to make explanatory links for these occurrences by referring to colonialism and post-independent developmentalism/nationalism and the implications of these changes for Kondh marginalization from the forests and the land.

Popular educators explain that the British Forestry Act of 1865, which then became the Indian Forest Act of 1874 (and has essentially remained intact since) clearly establishes state ownership of the forests, while also giving the state the authority to define what constitutes a "forest" (Section 2[3]). Furthermore, a complex land classification process has led to the de-tribalization of land and the destruction of forests as forests were removed from the moral subsistence economy of provision for the adivasi and inserted into the political economy of profit and limitless accumulation for state-capital led development. Through the establishment of reserved forests (reserved for national defence, communications, industry and purposes of "public importance"), revenue forests, fodder land etc., the state controlled the use of space in a manner that ignored the adivasis' traditional rights to the commons, reducing them to the status of encroachers or providing them with grudging concessions, such as the increasingly shrinking village forest classification intended for people's use. Tribals have no legal rights in "reserved forests", which are being exploited for revenue by the Orissa Forest Corporation and by private industry, which is being provided with logging contracts and cheap monopoly leasing licenses on non-timber forest products (NTFP) under the state NTFP policy.

Popular educators point out that these political-economic-legal structures have been justified by a sense of cultural superiority and the ethnocentric belief that adivasis are in need of civilizing and civilization or, worse still, are of no consequence and are expendable if necessary, in the interests of national development and the "public interest". Examples are used to illustrate adivasi struggles against such treatment, such as the Bhilala adivasi struggle against displacement by the Narmada River Valley Project, which will necessitate the displacement of 1.4 million people, or the various struggles against mining operations, 97% of which are located in predominantly adivasi regions of India.

Developing and Activating a Strategy for Improving Food and Land Security

Prompted by a critical appreciation of the social structural impediments to social change, such as those alluded to, critical dialogue also includes strategic discussion to improve Kondh community prospects for food and land/forest security. The informational and strategic knowledge of VICALP's popular educators is integral to this exchange as people are often unaware of constitutional guarantees, the law and policy pertaining to adivasi concerns, not to mention of administrative structures and procedural issues when dealing with various governmental departments. Such knowledge informs the process of constructing a response to adivasi domination.

Given the existing classification scheme for land and forests, Kondhs have been essentially defined as and forced into the permanent category of encroachers and squatters on public land/forests, for the most part. They often do not have pattas/deeds over hutment area land either, and are consequently in constant dread of forced eviction from their "illegal temporary domicile". Even when legally permitted to use certain classifications of land for subsistence, revenue inspectors and tehsildars have taken advantage of Kondh ignorance in such matters and have either forcibly evicted them or allowed them to stay on land in return for bribes. The traditional Kondh response has been evasion, payment of bribes, vacation and re-encroachment in other areas, pleas for leniency etc. A collective, organized response has been practically non-existent.

Through the popular education process, Kondhs are informed about various land classifications and possible opportunities for Kondh control over hutment, forest and agricultural land. For instance, they now know that encroachment into reserved forests, revenue forests (state enterprises) or "pathit land" (wasteland) is likely to be met with a severe response, with little chance for legal recourse on their behalf. Encroachment in "avada yogya anawadi" land (or vacant state land), on the other hand, provides the community with some options for long-term control and use of forests/land. With this in mind, the partner Kondh communities have decided to only encroach on avada yogya anawadi land (previously, encroachment was haphazard and individualized) through the development of community fruit orchards and rabi season vegetable gardens (second growth season) on slope land (just below hill tops). Individual family vegetable gardens (kharif season only/main growing season), fruit and grain cultivation have also been developed on dry land (lower hill slopes) anawadi land areas.

In addition to not having the necessary legal, administrative and strategic information/knowledge necessary to even begin to contemplate

Women organizing themselves *Foto: Dip Kapoor* other means for ensuring some control over land and subsistence concerns, the Kondhs have not had the necessary inputs to begin cultivation activities. Without active cultivation of land, it is not possible to address subsistence and/or future control over land (encroachment and activation of legal proceedings for land claims assumes cultivation is taking place). With the help of some external support, collective funds raised from the participating communities and from VICALP, the communities have collected enough capital to buy seeds, saplings and grains to begin the process.

Unlike in the past, the Kondhs pay encroachment fines, (Rs.100-200/charge) assessed by revenue inspectors (when asked for bribes, they now remind the inspectors to fine them instead!), for community orchard land encroachments. Continued refusal to vacate this land results in a case being filed against the respective community in a quasi-judicial revenue court, where judgments are made by the revenue division commissioner, as per the dictates of "directive principles of state policy". Under these directives, landless people cultivating avada yogya anawadi land for subsistence purposes are legally permitted to do so, if the land is not being utilized for productive purposes by the state. While this buys the communities temporary "legal right to use the land", the next step involves submitting an application to have the land reclassified as "community forest/land". This would now allow the community long-term use/control over this land (or places them in a position to negotiate future claims by the state), while the directives also stipulate that such land cannot be sold for commercial gain by the community. Periodically (and especially prior to elections), the government is known to re-classify land en masse on a "disputed zone basis". Consequently, the communities are being encouraged to continue to pay nominal fines for encroachment and continue to "maintain their case/dispute" in the revenue courts in order to avail of such "political largesse", when the opportunity arises.

Alternatively, continued cultivation of plots of land by the community and/or individual families for a period of twelve years eventually results in automatic title, as per existing land acquisition laws. Individual family encroachments will be decided via this avenue. In the case of pattas/deeds to hutment area land, people are simply expected to follow a paper and pencil application process and then persevere through the bureaucratic "waiting/massaging" process before pattas are granted. VICALP has not only informed these communities of the process but has also reduced the waiting time for families by assisting them with procuring forms, filling them out, filing and follow-up/pressure on the administrative machinery to follow through on these applications. These are normally daunting tasks for adivasis, who are illiterate in such matters, and communities are gradually growing in confidence and ability in this regard.

VICALP's popular educators also educate them about the bureaucratic channels that need to be approached. Discussion centers around the use of pressure tactics, which might include mailing campaigns, demonstrations, gheraos (encirclement) of key officials/offices/residence, marches, mass sit-ins, civil disobedience and other non-violent acts of protest and resistance to unresponsive and/or dominating practices by the state bureaucracy, subject to the particular issue/situation. The effectiveness of such actions requires a critical mass of people, and such support is building. VICALP started tangible organized action with some 30 villages and 3500 people four years ago, and today some 70 villages and 10,000 people belong to an organized constituency in a proximate geographical space in the same administrative block. Grouped into 6 regions, village organizations, regional organizations and multi-regional meetings heed the call of villages that require strength of numbers to apply civil pressure to protect or develop their collective interest.

Improved Material and Cultural Security for the Kondhs (1997–2001)

Kondh communities in the partnership are gradually expressing an increased sense of security about their prospects for subsistence and cultural autonomy, as 480 families (of 1471 families in the partner communities) have secured pattas/deeds to hutment land, while others are in the process of filing claims as well. In addition, all these families have started vegetable, grain and fruit cultivation on dry anawadi land on a total cultivable area of some 1500 acres, or an acre per family. Through the community fruit orchards, another 500 or more acres of anawadi land have been encroached on, and claims/cases have been booked by each of the villages in the revenue courts (a disputed zone has been created). As per community-established self-sufficiency land targets, there is more than enough anawadi land available in the region, making this a viable long-term strategy for them and other villages that will join the partnership in the future.

Through the vegetable cultivation initiative, people have grown and consumed (and sold the surplus) some 600,000 kgs of vegetables over 4 years, including squash, beans, brinjal, leafy greens, tomatoes etc. Similarly, 350,000 fruit trees have been planted over the same period of time (with an average 65% survival rate) in the community fruit orchards, and people are consuming/selling papayas, bananas, pineapples, mangoes etc. Grain cultivation (ragi, millet, paddy) has formed the basis for establishing emergency food stocks in the form of grain banks (with four successive year-end balances of over 50,000 kgs of grains) that have saved the communities in times such as the super-cyclone of October, 2000. The exploitative money-lending network in the area has been dealt a serious blow by this initiative and by people's savings-credit schemes (men and women each have their own SHGs in each village) that have been built with the help of some of the proceeds from the sale of surplus vegetables and fruits, in addition to animal husbandry schemes. After five years of tangible support from VICALP, some 25 communities are now in a position to buy their own seeds, saplings and grain to sustain existing and/or expanding cultivation activities on encroached land. Grain banks, community savings/income schemes, seed storage and nurseries are making cultivation activities sustainable and bringing the process entirely within community control. As villages like these become "self-sufficient", more villages will be brought into the partnership.

Furthermore, government support under various tribal and rural development schemes is finally being provided (as opposed to remain-ing as fictitious records in government files!), as organized pressure has seen to the completion of Rs.7,672,501 or US$192,000 worth of infra-structure projects over 4 years, such as the construction of link-roads, ponds, wells, community halls and bridges. The Kondhs are both "amused" and taken aback at the change in attitude towards them, exemplified in responses to their demands/requests for action, not to mention the declining incidents of harassment by officers, which used to take place on a regular basis prior to their activism.

Concluding Reflections

While we feel a lot has been accomplished in a relatively short span of time, such championing of adivasi constructive resistance runs the danger of obscuring some of the many difficulties that adivasis encounter in their attempt at resistance, such as the power of the brakes put on resistance by circumstances of domination. It would be well to take note that the focus of this article has been on accomplishments and that we have not considered the response of the state and other vested interests that feel "challenged" by an open, democratic policy of assertion by groups that are "expected" to remain submissive and docile. The following observation by an eminent political scholar and analyst of the Indian socio-political situation unfortunately rings true as well for the Kondh situational context: *"Through the manipulation of social divisions, the assertion of elite hegemony through the development process and the increasingly coercive powers granted to the state through legislation, there has been a growing brutalization of the state in its relationship to civil society"* (Kothari, 1987, 17). This being said, we feel that the Kondhs (with the help of small-scale partnerships with "outsiders") have made gains in systemic knowledge and understanding and are politically, strategically and tactically better equipped to deal with the pragmatics of social change, as it pertains to securing some of their material and cultural interests.

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